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ABSTRACT

This manual is a guide to handling data related to the federal student financial aid program through the electronic data exchange (EDE) system EDExpress. The overview defines how data is exchanged and identifies key players in the exchange of data. The overall process for sending and receiving data is outlined, along with the overall processing schedule, and the role of EDExpress and Edconnect, the computer software provided to institutions participating in the Student Aid Internet Gateway. Schools actually exchange information within five Student Financial Aid processors, and these are described. The second lesson sets forth the basics of EDE processing of student records, and the third explains how to import student data into the system. Lesson 4 discusses identifying records, and lesson 5 explains how to make corrections. Lesson 6 focuses on exporting data. Exercises are included to reinforce the messages of each lesson. (SLD)

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EDExpress Training

Apps101

2002 - 2003

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Participant Guide

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FEDERAL STUDENT AID

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FEDERAL STUDENT AID

Apps 101

Lesson 1—Overview

Lesson 2—Getting Started

Lesson 3—Importing Data

Lesson 4—Identifying Records

Lesson 5—Making Corrections

Lesson 6—Exporting Data

Lesson 1: Overview

Lesson 1 Objectives

- Define how data is exchanged
- Identify key players
- Explain the overall process for sending and receiving data
- Describe the overall processing schedule
- Explain the role of EDExpress and EDconnect

1

Key Terms

EDconnect

EDconnect is personal computer software provided free of charge to schools who have an SAIG account. EDconnect allows schools to transmit student records to and from the SAIG. Schools who participate in the SAIG need two types of software: administrative software, like EDExpress, to enter and manage student records; and communications software, like EDconnect, to handle the transmission of data records.

Export

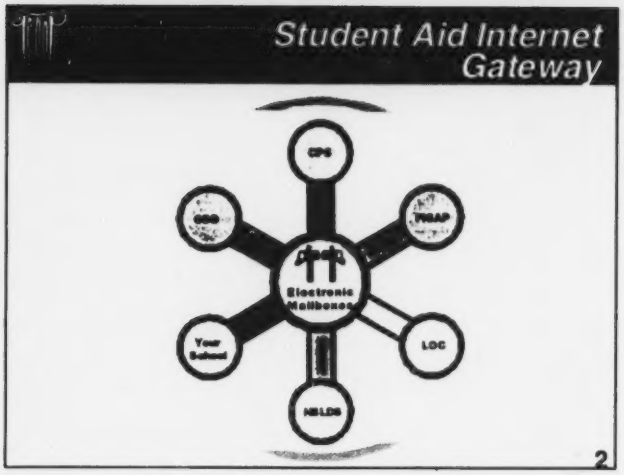
Export is an EDExpress function that creates a file of data records that is ready to be transmitted by EDconnect to the SAIG.

Import

Import is an EDExpress function that moves a file of data records that has been received from the SAIG into the EDExpress database.

SAIG

The Student Aid Internet Gateway is a telecommunications network that handles the exchange of data between participating postsecondary schools and SFA's processing systems.



What is the Student Aid Internet Gateway?

The Student Aid Internet Gateway (SAIG) allows schools to send and receive Title IV student financial aid data to and from SFA's processing systems. The SAIG used to be called the Title IV Wide Area Network (TIVWAN). SAIG provides similar services as the TIV WAN. The TIV WAN provided a private communications network, while the SAIG makes use of the Internet for data transmissions.

How is Data Exchanged?

The SAIG is a store and forward communication network. Each school with an SAIG account has a mailbox. Schools transmit data records (such as electronic applications) to the SAIG over the Internet. At the SAIG, records are stored in each school's network mailbox. Each processing system retrieves the data records from the network mailboxes at least daily. Once the records are processed, they are placed back in the mailboxes for schools to retrieve.

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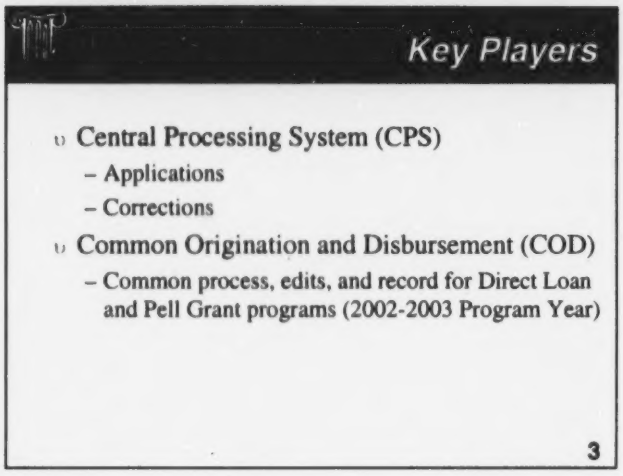

Key Players
Central Processing System (CPS)
– Applications
– Corrections
Common Origination and Disbursement (COD)
– Common process, edits, and record for Direct Loan and Pell Grant programs (2002-2003 Program Year)
3

Who Receives and Processes the Data?

Schools exchange data with five SFA processors.

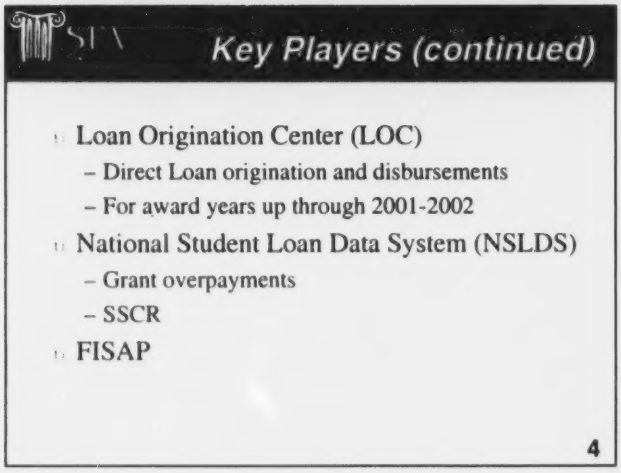
The Central Processing System (CPS)

The Central Processing System (CPS) processes both paper and electronic student applications and corrections. CPS calculates a student's Expected Family Contribution (EFC), performs database matches with other federal agencies, and sends a processed Institutional Student Information Record (ISIR) to the school. Using the SAIG, schools are able to:

- Submit initial federal student application data electronically and receive results electronically in the form of an ISIR;
- Submit renewal application data electronically and receive results as ISIRs;
- Receive ISIRs for students who submitted a Free Application for Federal Student Aid (FAFSA) using FAFSA Express, FAFSA on the Web , or a paper FAFSA, and indicated your school as one of their six choices;
- Submit corrections to federal application data electronically and receive results as ISIRs; and
- Submit a request for duplicate ISIRs.

The Common Origination and Disbursement (COD) System

Beginning for the 2002-2003 award year, schools will report Pell Grant and Direct Loan origination and disbursement information to the COD System. COD provides a common process and an integrated system for both programs. It also provides a single customer service number for both programs. "Full Participants" in COD during 2002-2003 will use a new common record with common data elements, definitions, edits, and structure across Pell Grants and Direct Loans. "Phase In" participants, who will be participating in the future, will use current record layouts.



Who Receives and Processes the Data? (continued)

Loan Origination Center (LOC)

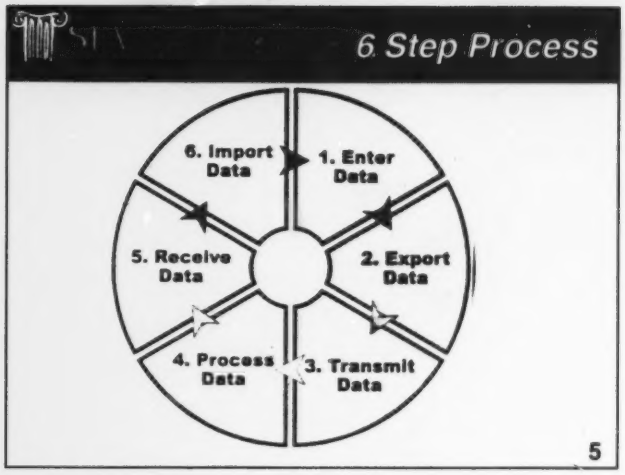
Schools participating in the Federal Direct Loan program will continue to use the SAIG to communicate electronically with SFA's Direct Loan Origination Center *for award years up through 2001-2002*. COD replaces the LOC beginning in 2002-2003. Participants transmit various types of data records required for processing Direct Loans to the LOC, including loan origination records, changes, and disbursements. For all information sent to the LOC, the school receives an acknowledgement file containing the acceptance or rejection of the data.

National Student Loan Data System (NSLDS)

The National Student Loan Data System (NSLDS) is a national database of loan information and selected grant data. Schools, guaranty agencies, and other SFA Title IV participants provide data to NSLDS. Schools communicate electronically with NSLDS using the SAIG. Data provided by schools to NSLDS include grant overpayment information and enrollment status information about loan recipients. NSLDS supplies financial aid history information to CPS for ISIR data.

FISAP

The annual Fiscal Operations Report and Application to Participate (FISAP) is the annual report schools file to report their use of campus-based program funds for the most recently completed award year and to apply for new funds for the upcoming award year. The FISAP must be submitted electronically to the campus-based system.



6 Step Process

Exchanging data with the SAIG is a 6-step process:

1. Enter Data

Create and save data records using the EDExpress software or your own data entry software. Data records that you might enter include applications, corrections, Pell Grant origination and disbursement records, and Direct Loan origination and disbursement records.

2. Export Data

Create a file of data records that you have entered using either EDExpress or your own software. The file must be in a format that adheres to the standards established by each of SFA's processors.

3. Transmit Data

Use EDconnect to access the SAIG and send the data file to your mailbox.

4. Process Data

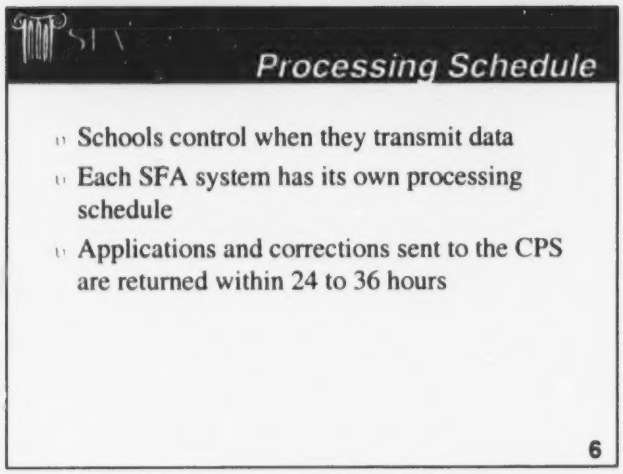
The appropriate SFA system retrieves the data from your SAIG mailbox, processes the data, and returns the processed results to your mailbox.

5. Receive Data

Use Edconnect to send an electronic request to the SAIG to receive your processed data.

6. Import Data

Import records stored in batch files on your PC into EDExpress or your own software package.


Processing Schedule
Schools control when they transmit data
Each SFA system has its own processing schedule
Applications and corrections sent to the CPS are returned within 24 to 36 hours
6

Overall Processing Schedule

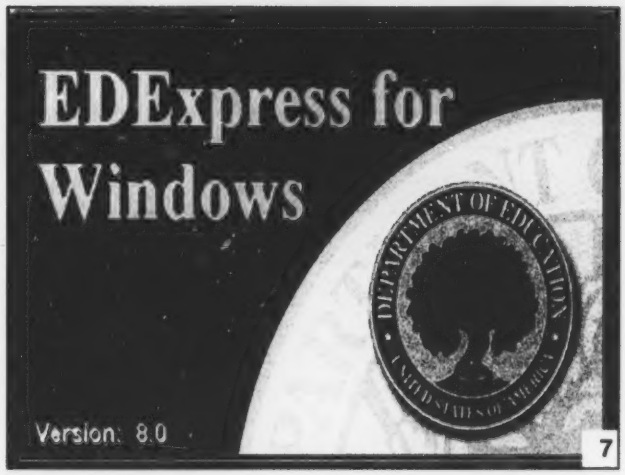
Schools have control over how often they transmit data to their SAIG mailbox. Some schools transmit daily; others transmit less often.

Each SFA system has its own schedule for processing the data submitted by schools. It's important to understand these schedules. The CPS, which processes applications and corrections, retrieves data once a day from each school's mailbox. It takes the CPS from 24 to 36 hours to return ISIRs to the school's mailbox.

Why does it take so long?

Once the CPS retrieves the application or correction data from the school's mailbox, it does the following:

- Edits the data;
- Computes an EFC;
- Transmits the records to several other computer systems for matching; (These systems include the Social Security Administration, NSLDS, Immigration and Naturalization Service, Selective Service, and Veteran's Administration.)
- Waits for the matching results to return from each system; and
- Creates ISIRs with the processing results and places them back into the school's mailbox.



What is EDExpress?

EDExpress is PC software that allows your school to manage student financial aid records. SFA provides EDExpress free of charge to all schools who have an SAIG account.

EDExpress has five modules. Schools have the option of using all, some, or none of the modules:

- **App Express:** Allows you to enter FAFSAs and corrections; edit the data; and create batch files to transmit to the CPS.
- **Packaging:** Allows you to package student financial aid awards.
- **Direct Loan:** Allows you to create loan origination records, print promissory notes, and post actual disbursements to be sent to the COD processor.
- **Pell**: Allows you to create Pell Grant origination and disbursement records and process Pell data to be sent to the COD processor.
- **Global**: Includes all of the functions within EDExpress that affect all modules or do not relate to a specific module.

Schools who don't use EDExpress must develop software, or acquire software from a vendor, to enter, edit, and create records to transmit to the SAIG.

What is EDconnect?

EDconnect is PC software that transmits the data records you created using EDExpress (or another software package) to the SAIG.

EDconnect manages your data files, keeps track of user IDs and passwords, dials the appropriate network telephone number, and initiates two-way communication with the SAIG.

EDconnect requires that you have a connection to the Internet. You must have either a direct connection to the Internet or a dial-up connection through an Internet Service Provider (ISP). Direct connections include DSL, T1, and cable modems. If you use a standard modem to connect to the Internet, you have a dial-up connection.

Lesson 1 Exercise #1

The 6 Step EDE Process

List the steps in the correct order (1 through 6)

_____ Process Data

_____ Import Data

_____ Enter Data

_____ Receive Data

_____ Export Data

_____ Transmit

Lesson 1 Exercise #2

Key Players

Match the key player with the correct description

A. Central Processing System (CPS)
B. Common Origination and Disbursement (COD)
C. Loan Origination Center (LOC)
D. National Student Loan Data System (NSLDS)
E. FISAP Processor

_____ Beginning in 2002-2003, receives and processes origination and disbursement data for both the Pell Grant and Direct Loan programs.

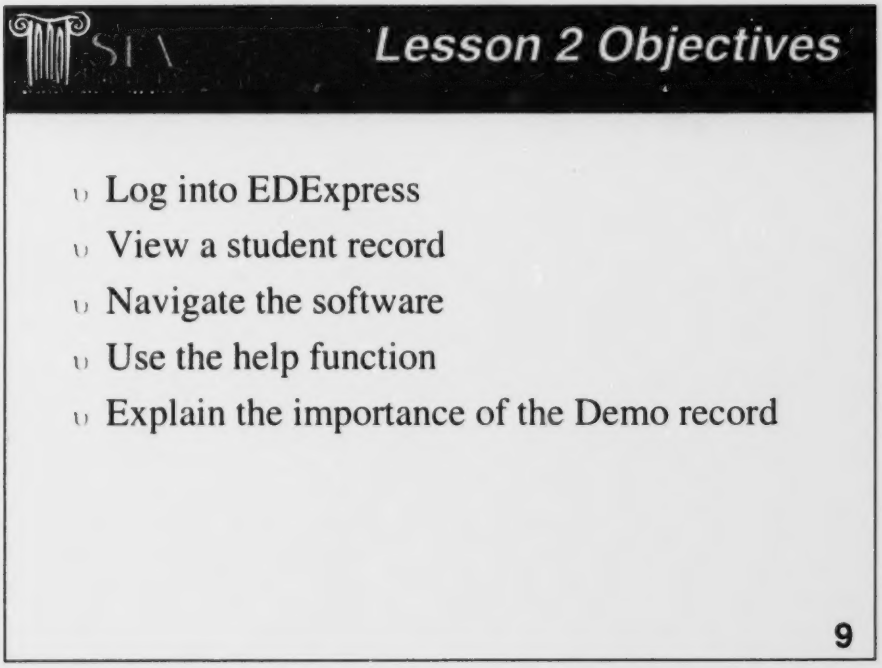
_____ Sends enrollment confirmation records to schools. Supplies financial aid history information to CPS for ISIR data.

_____ Receives and processes data from schools applying for campus-based funds and reporting expenditures of campus-based funds.

_____ Receives and processes initial application and correction data and sends the results to your school as an Institutional Student Information Record.

_____ Receives and accepts or rejects 2001-2002 loan origination records, promissory notes and actual disbursements for Direct Loan participating schools. Sends electronic acknowledgements back to your school.

Lesson 2: Getting Started



Key Terms

Demographic Record

A demographic record in EDExpress stores a student's demographic information, such as address, telephone number, and SSN. Each student in the EDExpress database has a demographic record. You can access all of the student's other financial aid records from the demographic record.

Hot Keys

Hot keys help you perform certain functions in place of the menu bar or the toolbar. These are commonly used hot keys in EDExpress:

CTRL and N: New (create a new record)

CTRL and O: Open (open and existing record)

CTRL and P: Print (go to the print dialog box)

Menu Bar

The menu bar is the line just below the title bar that displays options horizontally across the top of the screen. Click an option to pull down its menu. When the menu is open, click an option to select it. Menus display only the options for the EDExpress modules you've installed.

Toolbar

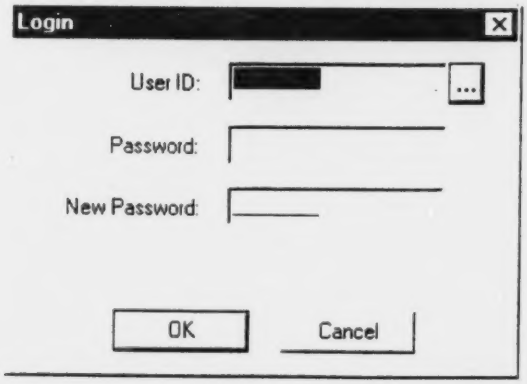
Toolbar provides buttons that you click on to access features that are also accessible via pull down menus.

Starting EDExpress for Windows:

Instructor Demonstration

In this demonstration, you will learn how to log into EDExpress.

Step	Action
1	From the Windows desktop, click **Start**.
2	Select **Programs/EDESuite/EDExpress 2002-2003/2002-2003 EDExpress for Windows.** The login dialog box displays. (See below)
3	Type your user ID. (If this is your first time logging in to EDExpress, your user ID is SYSADMIN. SYSADMIN is the default user ID. We have already established a user ID for you. It's APPS.) Type **APPS**.
4	Type your password. (If this is your first time to log in to EDExpress, your password is SYSADMIN. SYSADMIN is the default password. Also, if this is your first time logging in to EDExpress, you need to type a new password in the New Password text entry box. You would then be asked to verify the password. We have already established a password for you. It's APPS. You don't need to change it.) Type **APPS**.
5	Click **OK**. You have logged into EDExpress.

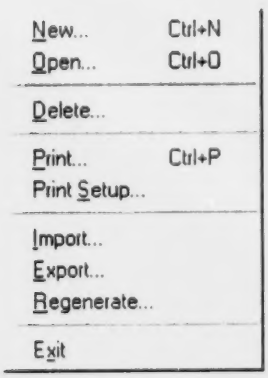


Navigation - Global: Instructor Demonstration

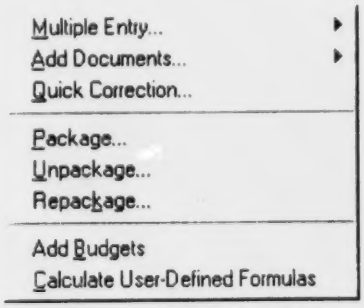
EDExpress for Windows was developed using a standard Windows menu structure. If you use other Windows software packages, many of the menu options will be familiar to you. (Note: All illustrations in this guide show Windows NT.) EDExpress uses a dynamic menu structure. This means the menu options will change according to where you are in the software. The main menu structure that appears when you open EDExpress shows all functions available when there are no student records open. This is referred to as the global level. Another menu structure will display additional options when the student records are open. This is referred to as the record level.

Step	Action
1	Select **File** from the menu bar. The File pull-down menu includes many of the operations involved in creating and accessing records, including import, export, and print. The Print function uses the Windows printer drivers.
2	Select **Process** from the menu bar. The Process pull-down menu includes options that are specific to Global functions, such as Quick Correction (which will be covered in Lesson 5).
3	Select **Tools** from the menu bar. The Tools menu consists of options that are used to set up, define software functions, and view data.
4	Note: We'll discuss the fourth menu option, Help, later in this lesson.

File:



Process:

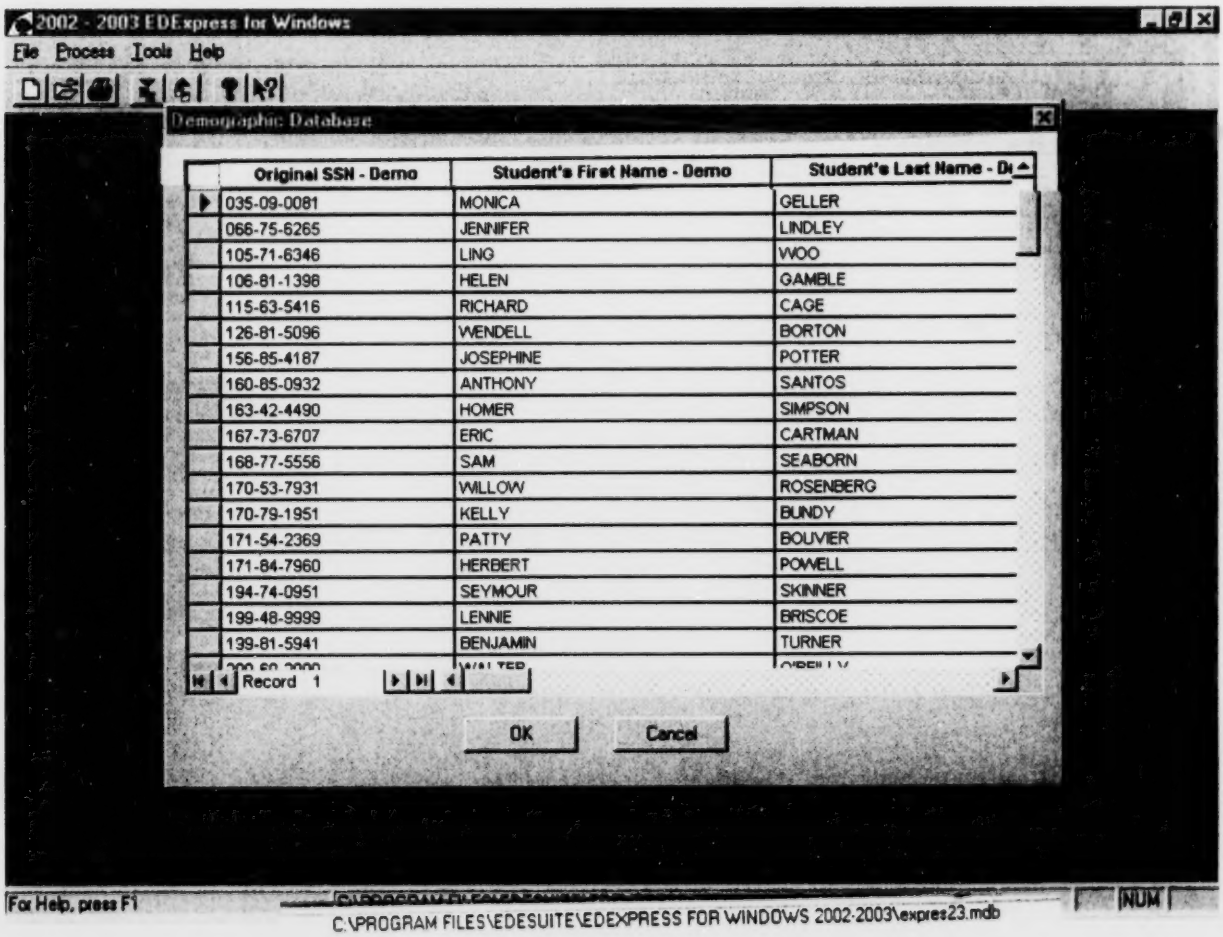


Tools:

18

Opening a Student Record: Instructor Demonstration

Step	Action
1	Select **File/Open** from the menu bar. The Open Student dialog box displays.
2	Click the **ellipsis button**: A list of records on your database displays.
3	Click the SSN of the record you want to open. In this case, click **035-09-0081**, the SSN for Monica Geller.
4	Click **OK**. The Open Student dialog box redisplays. Click **OK** again.



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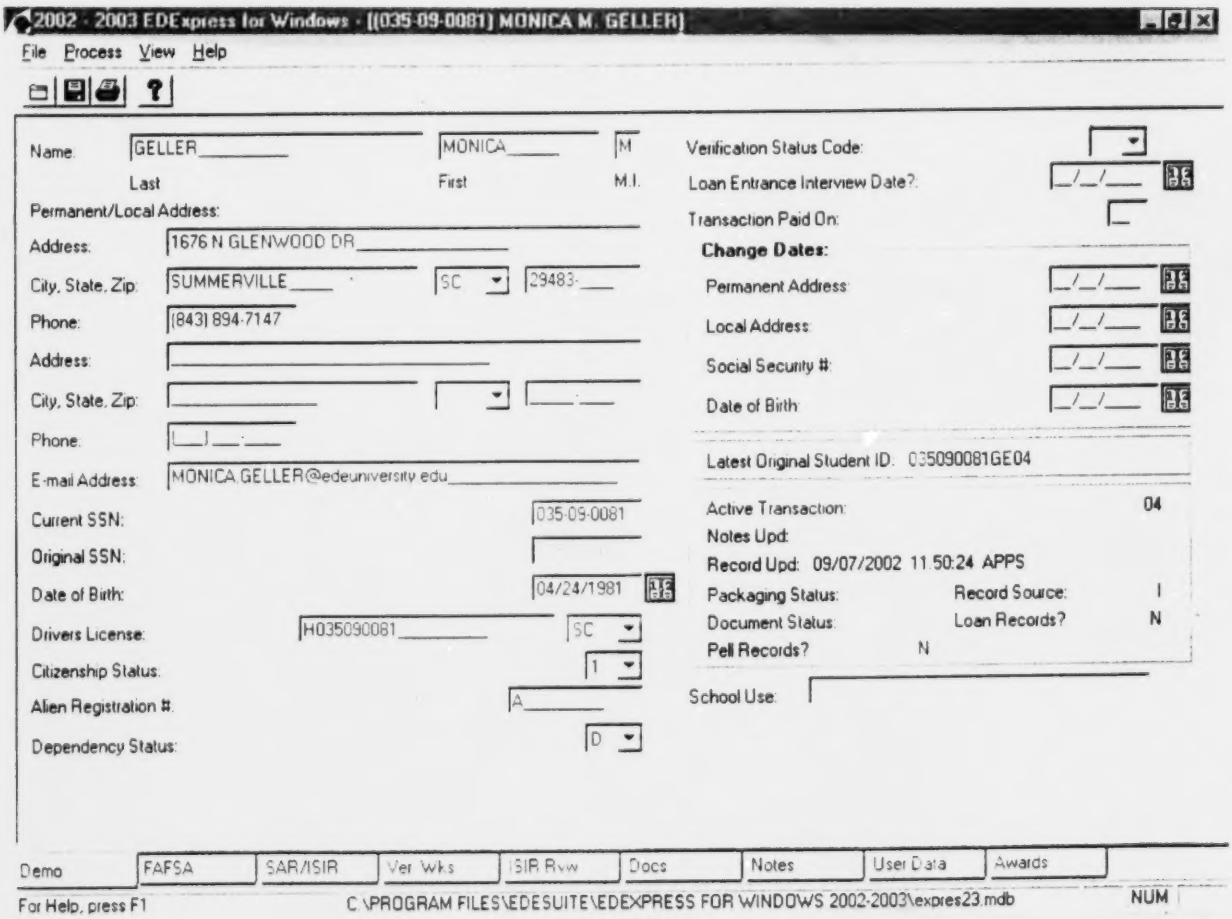
Demographic Record: Instructor Demonstration

The demographic - or demo - record is the default screen that appears each time you open a student record in EDExpress. To create and save a demo record, you must enter only the last name or first name and current SSN.

A demographic record in EDExpress stores a student's demographic information, such as address, telephone number, and SSN. Each student in the EDExpress database has a demographic record. You can access all of the student's other financial aid records from the demographic record, including the FAFSA, SAR/ISIR, Direct Loans, Pell, and Awards.

Click on the tabs at the bottom of the screen - FAFSA, SAR/ISIR, etc., - to access other information about the student.

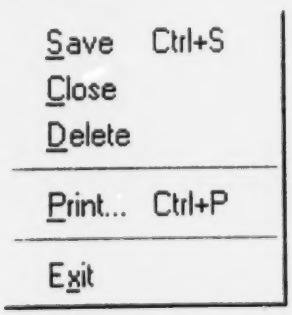


Navigation - Student Record: Instructor Demonstration

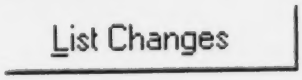
The menu bar changes when a student's record is open. The menu bar options are specific to student records.

Step	Action
1	Select **File** from the menu bar. The File pull-down menu includes operations involved in updating and manipulating records, including Save, Delete, and Print.
2	Select **Process** from the menu bar. The Process menu option List Changes shows the corrections you have made to the record.
3	Select **View** from the menu bar. The View pull-down menu includes a list of the tabs that can also be accessed at the bottom of the screen.

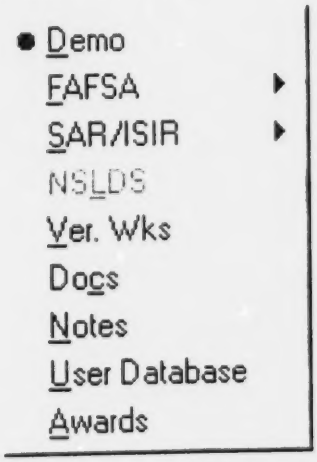
File:



Process:



View:



Closing a Student Record: Instructor Demonstration

Close the student's record to return to the global level.

Step	Action
1	Select **File/Close** from the menu bar.

Using the Toolbar: Instructor Demonstration

The toolbar at the top of the screen provides buttons that you click on to access features that are also accessible via pull down menus.

Step	Action
1	Click Use this icon to create a new student record. (Click **Cancel** to return.)
2	Click Use this icon to open a student record. (Click **Cancel**.)
3	Click Use this icon to print reports. (Click **Cancel**.)
4	Click Use this icon to import records. (Click **Cancel**.)
5	Click Use this icon to export records. (Click **Cancel**.)
6	Click Use this icon to find out what version of EDExpress you are using. (Click **OK**.)
7	Click Use this icon to get help about a particular field.

Using the Toolbar: Instructor Demonstration (continued)

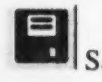
Once a student record has been opened, each tab has its own customized toolbar. Some of the same buttons will be available in each toolbar. For example, the following toolbar appears at the top of the SAR/ISIR tab.

Below are most of the buttons available on the toolbars within EDExpress.

New record

Open a record

Close a record

 Save a record

Print records

Add a record

Go to previous record

Go to last record

Retrieve a record

Import records

Calculate an EFC

Package a record

Go to page 1

Go to page 2

Go to page 3

Go to first record

Go to next record

About EDExpress for Windows

Help

Export records

Hot Keys: Instructor Demonstration

EDExpress also lets you use hot keys to perform certain functions in place of the menu bar or the toolbar.

Step	Action
1	Press the **CTRL** and **N** keys at the same time to create a new record. (Click **Cancel** to return.)
2	Press the **CTRL** and **O** keys at the same time to open a record. (Click **Cancel** to return.)
3	Press the **CTRL** and **P** keys at the same time to print a report. (Click **Cancel** to return.)

Exiting EDExpress: Instructor Demonstration

Step	Action
1	Select **File/Exit** from the menu bar.
2	Click **Yes** to confirm.

Help - Getting Started: Instructor Demonstration

EDExpress has an extensive on-line help system that will be particularly useful if you are a brand new user. Start by accessing the "Getting Started" help file.

Step	Action
1	From the Windows desktop, click **Start**.
2	Select **Programs/EDESuite/EDExpress 2002-2003.** The Help Topic dialog box displays. Click **2002-2003 Getting Started**. The Getting Started dialog box displays. (See below)
3	Click on the **Getting Started** icon to display a list of topics. Click on a topic. If you are looking for something specific, it may be easier to find it using the Index tab.
4	Click the **Index** tab. Type the word you want to find. The list will be displayed alphabetically based on the letters you type. To view the help text for your topic, you can double click on it directly from the index or you can click on it and then click the **Display** button.

Help EDExpress: Instructor Demonstration

Help may also be accessed once you are logged into EDExpress. You can access Help from the menu bar. Or, you can press the **F1** key while a field is highlighted in a record or dialog box.

Step	Action
1	Log into EDExpress. Remember: the User ID is **APPS** and the Password is **APPS**.
2	Select **Help** from the menu bar.
3	Select **Help Topics** from the pull-down list. Each topic in the Help Topics list represents a module in EDExpress. If a topic has subtopics, these are listed when you click on the topic. Definitions are provided for each subtopic. Related topics are displayed below each topic description and are hypertext linked. Terms displayed in green with an underline are glossary terms. Click on them to see a definition.
4	Explore the help system. Click **Cancel** when you are done.

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Lesson 2 Exercise

Scenario

You are a new work-study student in the financial aid office. Your supervisor has given you a list of Social Security Numbers for students who need researched. The first SSN on your list is:

664-64-6446.

Instructions

Log into EDExpress and open the student's record. Explore the available screens by clicking the tabs at the bottom of the screen. Answer the questions below.

Remember: The User ID is **APPS** and the Password is **APPS**

Review

1. What is the name of the student?

_____

2. What is the name of the first screen that is accessed and what is the importance of this screen?

_____

3. What tab(s) allows you to view the student/spouse income?

_____

4. How did you open the student's record? Did you use the menu bar, toolbar, or hot keys?

_____

5. Is a % sign an acceptable character to enter in the e-mail address field? How did you get your answer?

_____

Lesson 3: Importing Data

Lesson 3 Objectives

- Explain the import function and describe the contents of the ISIR
- Identify different ISIR types
- Identify the use and function of message classes
- Identify the use and function of Batch IDs
- Explain the importance of various transactions
- Use the import function to add ISIR data to the EDExpress database
- Use the Batch Activity Browse tool to view records of imported batches

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Key Terms

Batch IDs

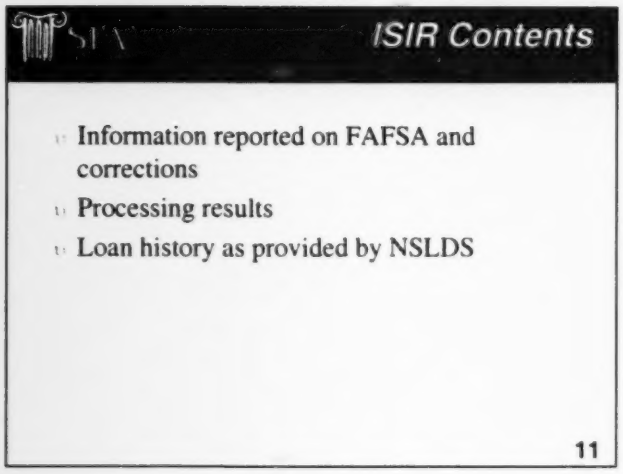
Batch IDs are a means of tracking a group of student records. They are 23 characters long. The batch ID is unique to that batch and its format is specified. CPS generates Batch IDs for files it creates (for example, files containing ISIRs). EDExpress creates Batch IDs for files that the school creates to transmit to the CPS (for example, corrections.)

Message Classes

A message class is a filename that identifies the data contained within a file. The message class is six characters long, with the first four characters specifying the type of data, the next two indicating the processing year, and the last two describing whether the file is an output or input file.

Transactions

Each separate ISIR is known as a transaction. A student might have one transaction per award year; or a student might have more than a dozen transactions, depending upon how many corrections are submitted. A two-digit Transaction Number identifies the transaction, with 01 assigned to the first transaction, 02 to the second, and so on



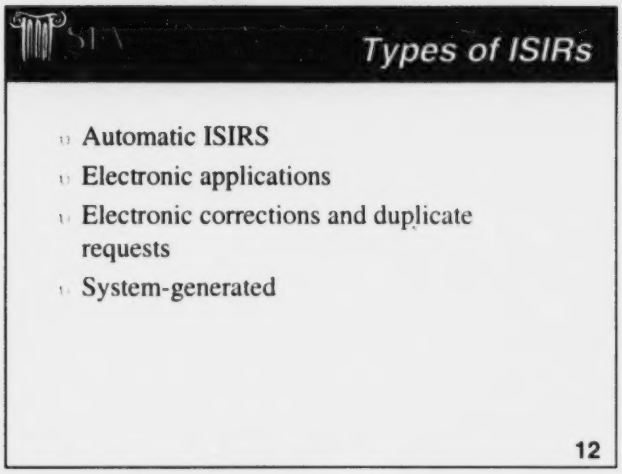
ISIR Contents

The ISIR is a fixed length record that contains 2,450 characters of information. The ISIR has:

- All of the information that the student reported on the FAFSA or on a subsequent correction;
- Official processing results, such as the EFC, reject reasons, SAR C Code, database match results, and Verification Flag; and
- Information about the student's loan history that has been provided by the NSLDS.

The detailed contents of the ISIR are found in the record description on the SFA download site:

SFAdownload.ed.gov



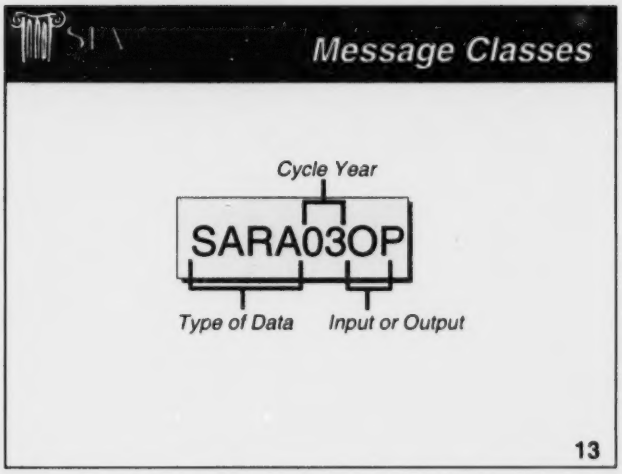
Types of ISIRs

ISIRs are classified by their source.

Each time a student completes a paper FAFSA, Renewal FAFSA or FAFSA on the Web and lists your school code, you will automatically receive an ISIR for that student. You will also receive an Automatic ISIR if the student completes a correction on a paper SAR, or submits the corrections on corrections on the web, or if another school completes an electronic correction for the student and lists your school code.

Also, each time you create and submit an electronic application, correction, or duplicate request, you will receive a corresponding processed ISIR.

Finally, the CPS will occasionally generate ISIRs without any input from a student or a school. For example, in certain cases the CPS completes matching student record data against outside databases after the initial ISIR is produced and transmitted to the school. In such cases, the CPS will systems-generate a new ISIR with the processing results.



Message Classes

Each type of ISIR is placed in a separate file with a filename that identifies the type of data contained in the file. The filename is known as a message class.

The first four characters of the message class identify the type of data.

For example, SARA indicates that the file contains Automatic ISIRs.

The second two numbers refer to the last two characters of the award year cycle. In this example, the award year cycle is 03, for 2002-20**03**.

The last two characters indicate input or output data. "IN" refers to what is sent in by the user for the CPS to retrieve. "OP" refers to what the CPS has put back on the network for the user to retrieve.

All of the message classes for the 2002-2003 processing cycle are presented on the following page.

Message Classes

Message Class	Data Description	User Sends or Receives
CORR03IN	Electronic Corrections/Duplicates	Sends
CORE03OP	Electronic Correction/Duplicate Errors	Receives
CORR03OP	Electronic Correction/Duplicate ISIR	Receives
EAPR03OP	Electronic Application Reject	Receives
EAPS03IN	Electronic Applications	Sends
EAPS03OP	Electronic Application ISIRs	Receives
EDM003OP	ED Initiated Imports 0	Receives
EDM103OP	ED Initiated Imports 1	Receives
EDM203OP	ED Initiated Imports 2	Receives
EDM303OP	ED Initiated Imports 3	Receives
EDM403OP	ED Initiated Imports 4	Receives
EDM503OP	ED Initiated Imports 5	Receives
EDM603OP	ED Initiated Imports 6	Receives
EDM703OP	ED Initiated Imports 7	Receives
EDM803OP	ED Initiated Imports 8	Receives
EDM903OP	ED Initiated Imports 9	Receives
EREP03OP	PIN Mailer Request Errors	Receives
ESFN03OP	State Agency ISIR Nonresident	Receives
ESFR03OP	State Agency ISIR Resident	Receives
FDRE03OP	Rejected FDR Request	Receives
FDRF03OP	Processed FDRs	Receives
FDRS03IN	FDR Request	Sends
FDRU03OP	Unfulfilled FDRs After 30 Days	Receives
HOLD03OP	Signature Hold File	Receives
RADD03IN	PIN Mailer Requests	Sends
RADD03OP	RAPP/PIN Print Notification File	Receives
SARA03OP	Automatic ISIRs	Receives
SARA23TS	Electronic SAR - Test Mode	Receives
SIGA03OP	Signature Correction Acknowledgments & Errors	Receives
SIGS03IN	Signature Corrections	Sends
SYSG03OP	Systems Generated	Receives
YTDN03OP	State Agency YTD ISIR Nonresident	Receives
YTDR03OP	State Agency YTD ISIR Resident	Receives
YTDO03OP	Year-to-Date ISIRs	Receives

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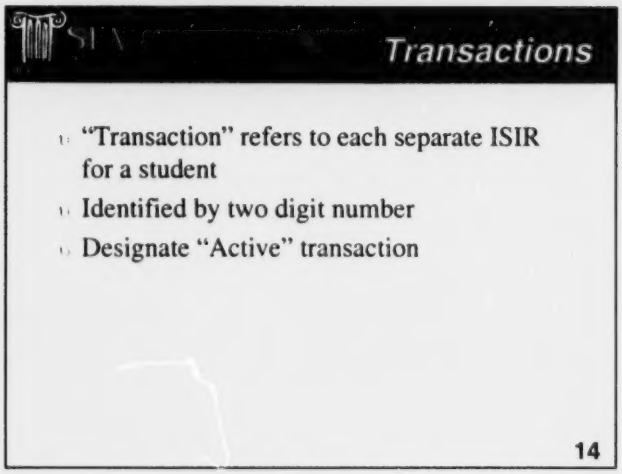
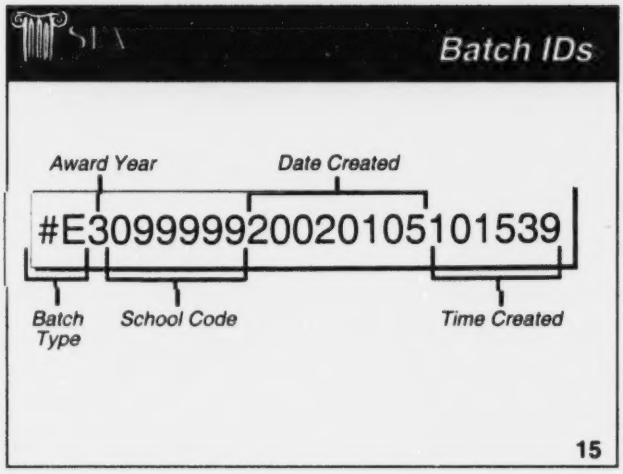


Transaction

You might receive more than one ISIR for a student. The first ISIR will typically be the result of a FAFSA submission, either electronically or on paper. Subsequent transactions will reflect corrections to the student's application record. Each separate ISIR is known as a transaction. A student might have one transaction per award year; or a student might have more than a dozen transactions, depending upon how many corrections are submitted. A two-digit Transaction Number identifies the transaction, with 01 assigned to the first transaction, 02 to the second, and so on.

EDExpress provides you the ability to store all ISIR transactions for a student. If a student has more than one transaction, you will need to identify the transaction on which you intend to pay the student. Some schools always pay on the highest transaction. Others designate an "active transaction." You can designate one of the transactions as "active" by opening the transaction on the SAR/ISIR tab and selecting **Process/Activate Transaction**.



Batch IDs

EDExpress uses Batch IDs to keep track of student records. CPS has already assigned the Batch ID for files that you import into EDExpress. Each time you export a file, EDExpress assigns the Batch ID.

The first letter of a batch ID identifies the type of data contained in the batch. For example, "E" identifies this data as an Automatic ISIR batch.

The list of most commonly used batch types follow:

E	Automatic ISIRs
A	Electronic applications (includes electronic applications you have created and sent, as well as the resulting ISIR file)
C	Electronic corrections and duplicate requests (includes electronic corrections and duplicate requests you have created and sent, as well as the resulting ISIR file)
G	System-generated ISIRs

The next number in the Batch ID refers to the last digit in the award year cycle. In 2002-2003, the number will always be 3.

The following six digits is your school code that you have entered into EDExpress.

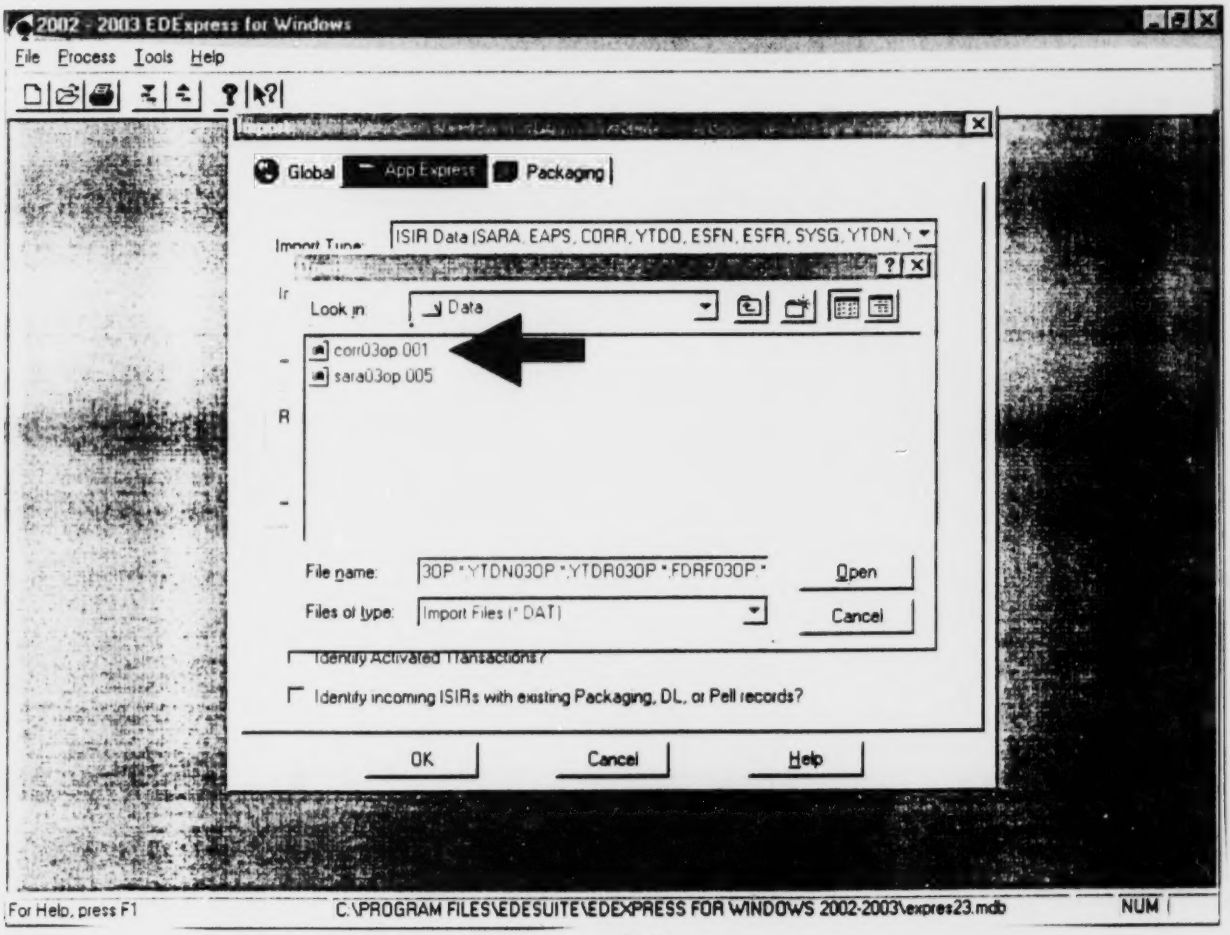
The next eight digits refer to the date (four-digit year, month, and day) this batch was created. This batch was created on January 5, 2002.

The last six digits refer to the time (hours, minutes, and seconds) the batch was created. This batch was created at 10:15 and 39 seconds.

Importing ISIR Data – Instructor Demonstration

The first step for many EDExpress users is to import ISIRs into EDExpress. During the process of importing, the file that you received from CPS is edited and placed into the EDExpress database format where the records can be viewed and printed.

Step	Action
1	Select **File/Import** from the menu bar.
2	Click the **App Express** tab. Ensure that **ISIR Data (SARA, EAPS, CORR,...)** displays as the import type.
3	Click the **File** button. An Open dialog box appears with all of the files that have SARA, EAPS, CORR, YTDO, ESFN, ESFR, SYSG, YTDN, YTDR, and FDRF as their message class prefix displayed.
4	Click **corr03op.001**.



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Importing ISIR Data – Instructor Demonstration (continued)

Step	Action
5	Click **Open** to return to the import screen.
6	Click **Screen** in the Report to: field. An Import Edit Report will display on the screen after you import the ISIR file.
7	Click **Prompt for Duplicates?** For all imports except errors, you can direct EDExpress to prompt you when it encounters a record that you have already imported. Whether you mark this option or not, EDExpress will not import a duplicate record.
8	Leave the **Import NSLDS Data?** marked. NSLDS Data is that portion of the ISIR that contains the student's loan history data as received from NSLDS. If you want to import ISIR data without NSLDS data, click this box to remove the default check.
9	Click **Identify Activated Transactions?** If you mark this option, EDExpress notifies you when a new ISIR is imported for a student on your database that already has an active transaction. Also, the Import Edit Report displays both the Active ISIR's EFC, as well as the EFC of the incoming ISIR transaction. The NSLDS default flag also displays for both transactions.
10	Click **Identify incoming ISIRs with Packaging, DL, or Pell Records?** If you mark this option, EDExpress notifies you when an ISIR is imported for a student on your database that already has a Packaging, Direct Loan, or Pell record. The information appears on the import edit report.
11	Leave **Compare Demographic Data?** unmarked. You mark this checkbox if you want EDExpress to print on the Import Edit Report a comparison of imported ISIR data and demographic data. This option is useful if you have ISIR transactions on your database and you want to see if any of the demographic data (name, address, etc.) on new transactions has changed. The default setting for this checkbox (always marked or not marked) is determined in the App Express setup. This option prints only the student records that are different from those in the demographic table.

Importing ISIR Data – Instructor Demonstration (continued)

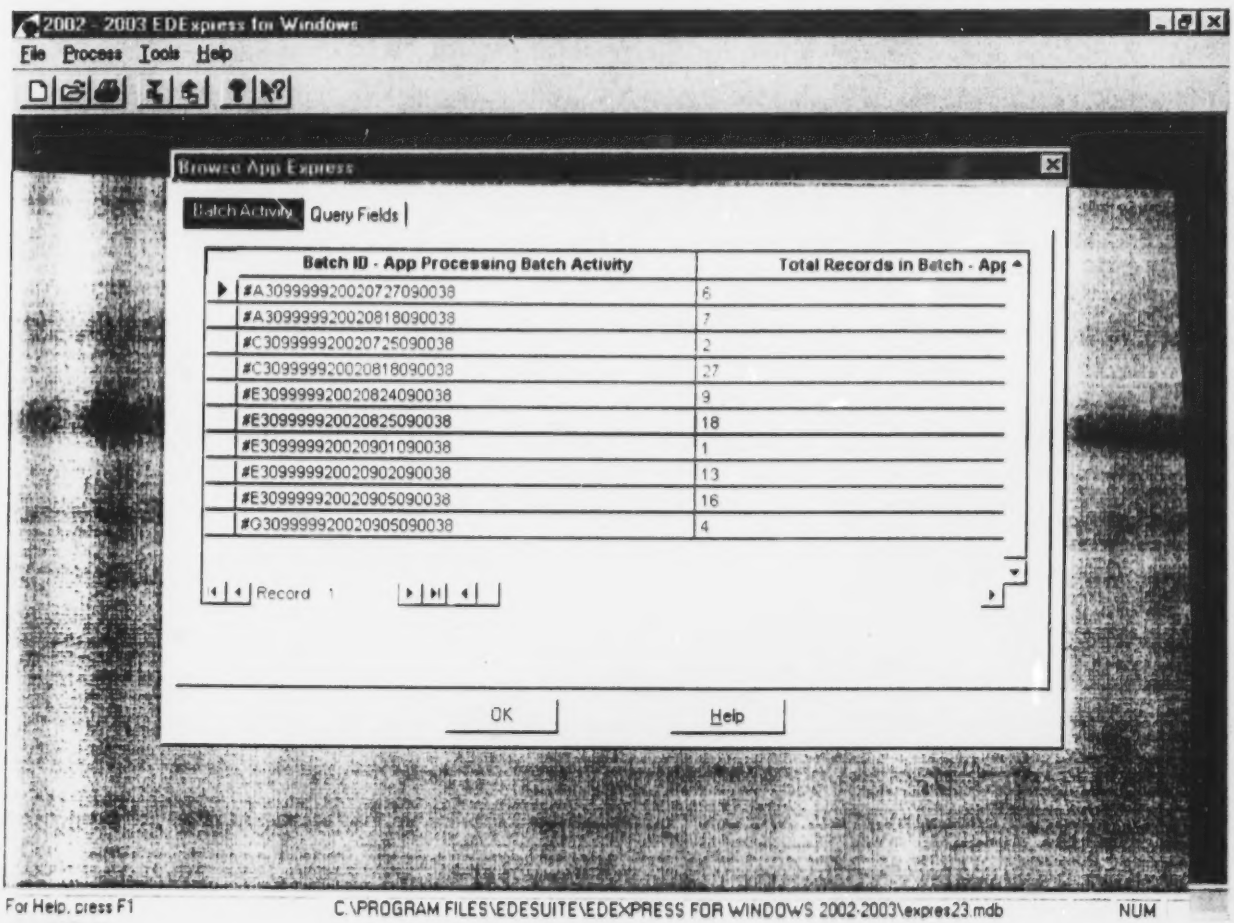
Step	Action
12	Leave **Update Demographic Data?** marked. Enable this checkbox if you want EDExpress to automatically update the demographic fields of the records in your database when you import ISIRs. The default setting for this checkbox is determined in the App Express setup.
13	Click **OK** to begin to import the file. A batch report displays, showing the number of records that have been imported.
14	Click **OK** again. The Import Edit Report displays. This report also provides statistics about the imported records. If any records are in error or skipped, the student's SSN and name are listed. Note that the batch ID assigned at the CPS displays at the top of the report. In this case, 2 records were added to the database.
15	Click **Close**.

```
Report Date: 09/07/2002      U.S. DEPARTMENT OF EDUCATION                    PAGE:  1
Report Time:   13:00:39           EDEXPRESS - 2002-2003
  IMPORT RECORDS EDIT REPORT - ISIR Data (SARA, EAPS, CORR, YTDO, ESFN, ESFR, SYSG,
                                YTDN, YTDR, FDRF)
     THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*************************************************************************************
Batch ID: #C309999920020725090038

                    Name                                          Existing
Student SSN  Trans   ID     Student Name                          Records    Skipped

-------------------------------------------------------------------------------



Total Student Records Accepted:        2
Total Student Records in Error:        0
Total Student Records Skipped:         0
Total Student Records in Batch:        2
```

Browsing the Batch Activity Database: Instructor Demonstration

Each time you create an export file, an import file, or regenerate an existing batch, an entry is made on the Batch Activity Database. The batch activity browse tool helps you track the batches you have created and received by allowing you to view the records in the Batch Activity Database. Each row in the database represents a batch and includes such information as the batch ID, the number of records included, and the user who created it.

Step	Action
1	Select **Tools/Browse/App Express** from the menu bar. The Browse App Express dialog box displays, listing all of the batches that have been created. Move the horizontal scroll bar to display the information that is stored about each batch.
2	Click **OK** when you are finished browsing through the records.



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Lesson 3 Exercise: #1

Scenario

One of your daily assignments is to import all of the files that have been received from the SAIG the night before. Last night you received two ISIR files, one resulting from corrections you submitted and the other resulting from FAFSAs that students filed.

Instructions

Import the ISIR file that was the result of FAFSAs that students filed. Browse the Batch Activity database to review information about all of the data files that have been imported and exported.

Review

1. What message class is used for the batch that you imported?

   _____

2. How many records were accepted?

   _____

3. Were there any skipped records in the imported batch?

   _____

4. On what day was the batch processed at the CPS?

   _____

5. Has a batch been imported before that had 27 records? If so, what was the message class of the imported file?

   _____

Lesson 3 Exercise: #2

True or False :

1. _____ The "active" transaction is always the transaction with the highest Transaction Number.

2. _____ You cannot import NSLDS data during an ISIR Import.

3. _____ The Import Edit Report displays how many records were successfully imported into EDExpress.

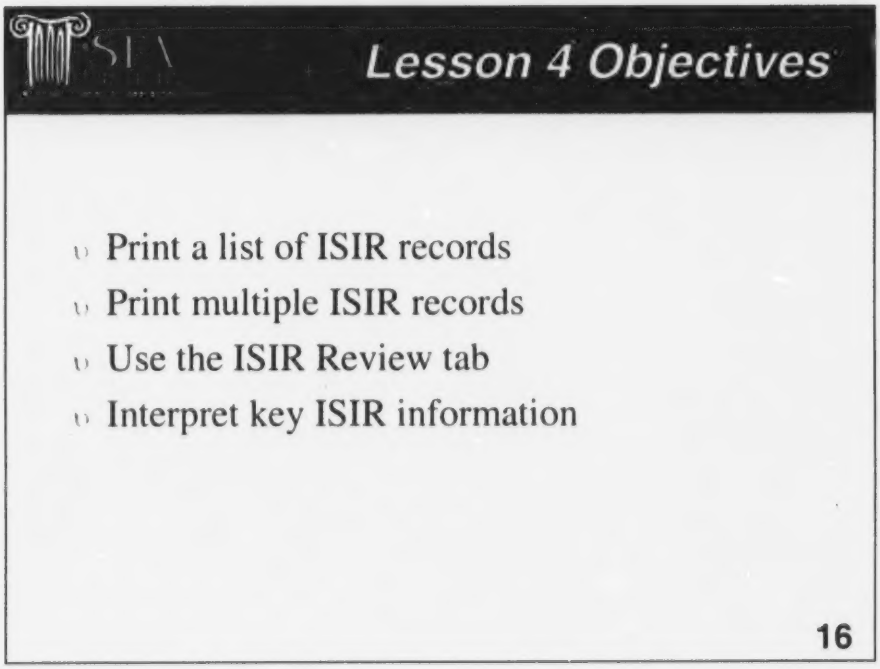
4. _____ You can tell the date and time the ISIR data was imported by reviewing the batch ID.

5. _____ You can tell the date and time the imported ISIR data was processed at the CPS by reviewing the batch ID.

6. _____ Use the Identify Activated Transactions? option if you want to see if the ISIR being imported has a lower EFC than the active transaction on your database.

7. _____ EDExpress will always add all of the ISIRs on the imported file to the database, even if a duplicate ISIR already exists on the database.

Lesson 4: Identifying Records



Key Terms

Current SSN

Two Social Security Number fields are carried on the student's record: Current SSN and Original SSN. The Current SSN is the most recently reported Social Security Number. It will always equal the Original SSN, unless the student corrects the SSN.

FAA Comments

FAA Comments are the comments on the ISIR that are directed to the financial aid administrator.

Original SSN

The Original SSN is the Social Security Number the student first reports to the CPS. It never changes. If the student corrects the SSN, the corrected SSN is the Current SSN.

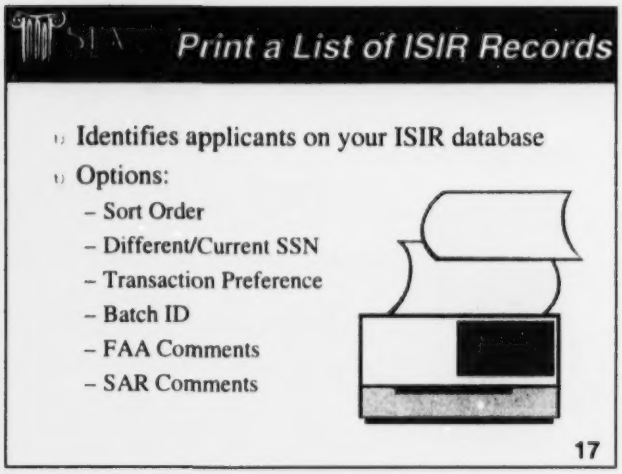
Trankey

The Trankey identifies the student's ISIR record. It consists of the student's Original SSN, first two letters of the last name, and transaction number.

Transaction Type

Transaction type indicates the source of the ISIR. The codes follow:

0 = Electronic initial application
1 = Automatic ISIR generated from a paper FAFSA or Renewal FAFSA
2 = Electronic correction
3 = Electronic duplicate request



Print a List of ISIR Records

After you import a batch of processed ISIRs, you may want to print a list of the records contained in the batch.

For each ISIR record, the List - Processed ISIRs report displays the name, Social Security Number, Transaction Number, Processed Date, Transaction Type, EFC, and whether or not the applicant was selected for verification.

You can print a list of all ISIR records on your database or you can use a query to select certain records to print on your report.

The following other options are available when printing a list of ISIR Records:

- **Sort Order:** ISIRs can be sorted in either Last Name order or SSN order.
- **Different/Current SSN?**: Use this option to print a list of ISIRs where the student's current SSN is different than the original SSN.
- **Transaction Preference**: You can specify whether to print the highest transaction, active transaction, or all transactions for a student.
- **Batch ID**: You can specify to print all ISIR records associated with a particular batch. Use this option if you want to identify those records that you just imported.
- **FAA Comments?:** If you want EDExpress to print FAA comment codes, click the checkbox to enable this option.
- **Print SAR Comments?:** If you want EDExpress to print SAR comment codes, click the checkbox to enable this option.

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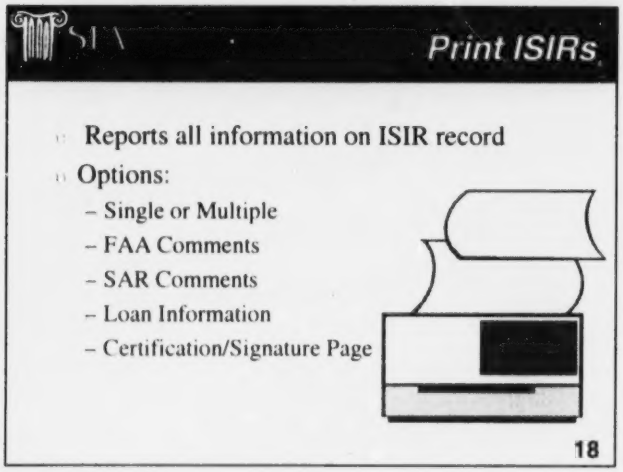


Print ISIRs

The List - Processed ISIRs report, discussed previously, provides a limited amount of information from each ISIR record. EDExpress also provides the option of printing the full ISIR record for each student.

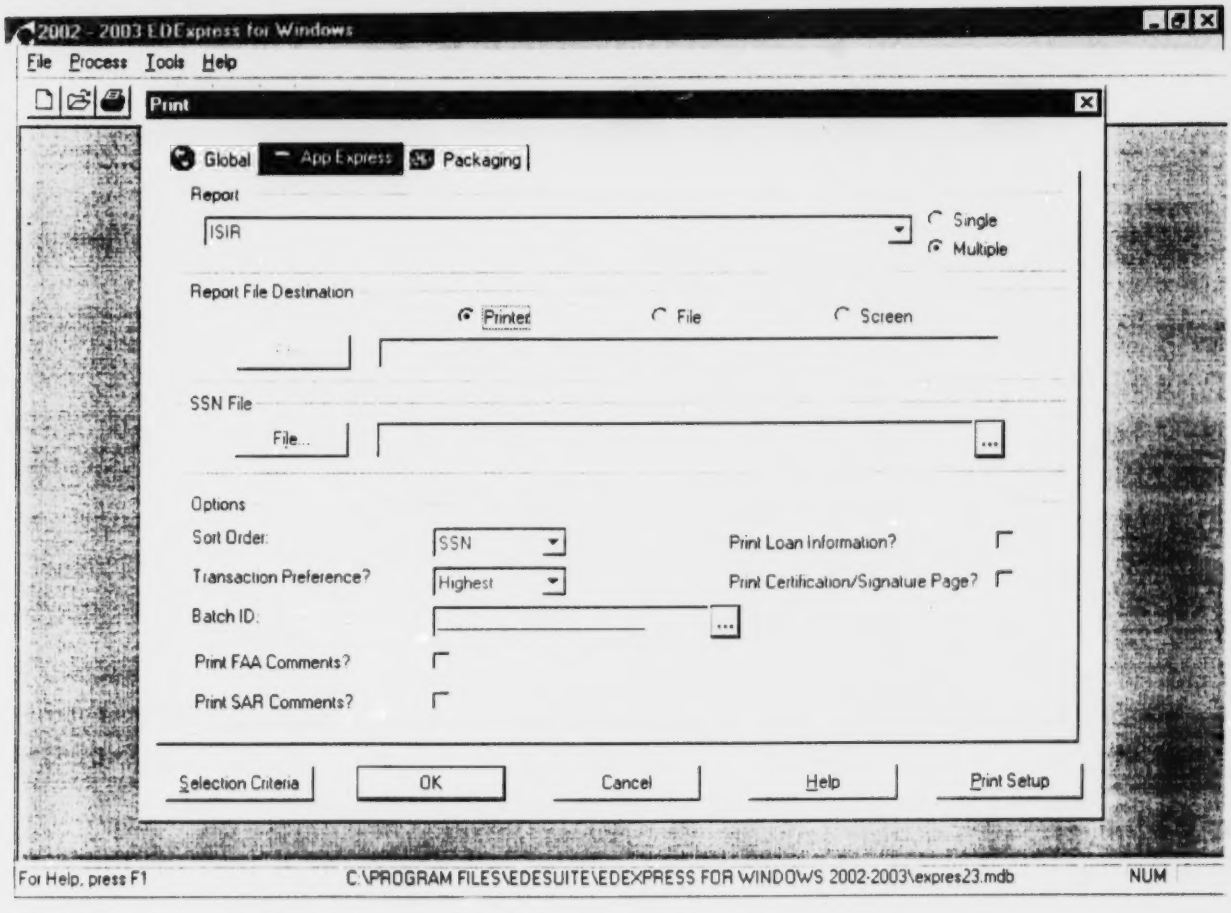
You can print a single ISIR for a specified student by entering the student's Trankey, which consists of the student's Social Security Number, first two letters of the last name, and transaction number.

EDExpress also provides a multiple option, which allows printing of numerous ISIRs at one time. When you select multiple, you have the same options available to you that you have when printing the List - Processed ISIRs report. You can use a query to select certain records to print. You can also specify the sort order, transaction preference, and batch ID.

The basic ISIR report is two pages long. However, EDExpress provides you the option of printing the following extra information:

- **Print FAA Comments?:** If you want EDExpress to print FAA comments when printing ISIRs, mark this box.
- **Print SAR Comments?:** If you want EDExpress to print SAR comments when printing ISIRs, mark this box.
- **Print Loan Information?:** If you want EDExpress to print the information on the ISIR that is received from NSLDS, mark this box.
- **Print Certification/Signature Page?:** If you want EDExpress to print a certification page when printing ISIRs, mark this box.

The dialog box for printing multiple ISIRs is shown on the following page.



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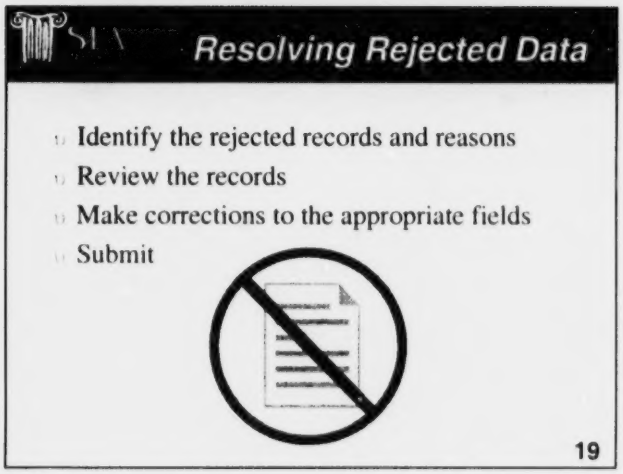
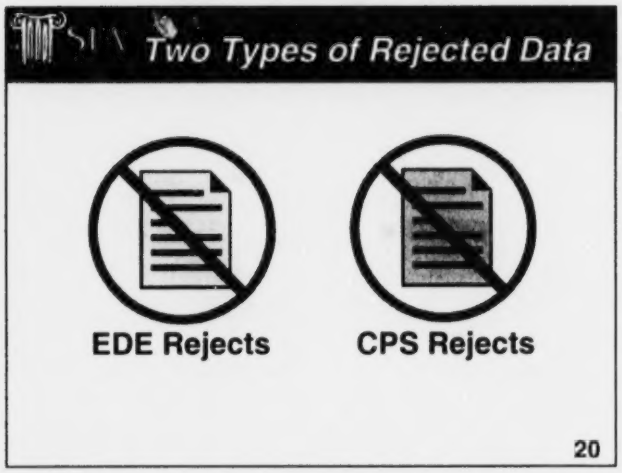


Resolving Rejected Data

Once you import ISIRs you will want to identify those student records requiring follow-up.

Applications that have been rejected by the CPS are one type of student record that will require follow-up. Follow these steps when resolving rejected data:

1. Identify rejected records by printing a List - Processed ISIRs report. Use a query that identifies all rejected records, or records that meet a specific reject reason.
2. Review the full ISIR records of the rejected applicants using one or more of these methods:
   - Printing ISIR reports;
   - Viewing messages (a demonstration of how to view messages will be provided later in this lesson); and
   - Using the ISIR Review tab to review multiple transactions (a demonstration of how to use this feature will be provided later in this lesson).
3. Open the individual records and make corrections to the appropriate fields (how to make corrections is covered in Lesson 5).
4. Submit the corrections (how to export records is covered in Lesson 6).

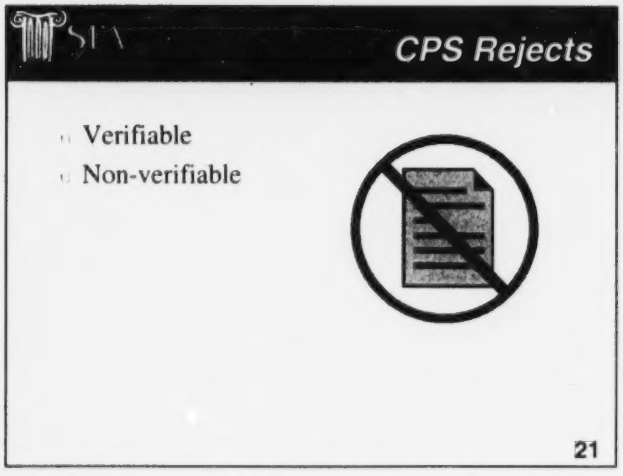


Two Types of Rejected Data

You will encounter two types of rejected data: EDE and CPS.

- EDE rejects occur when information in a specific field or an incorrect Batch ID does not allow records to be processed. EDExpress users will rarely encounter EDE rejects because the software contains edits to ensure that the conditions that create an EDE reject do not occur.
- CPS rejects occur when a record can be processed but errors in the data prevent the EFC from being calculated.

48



CPS Rejects

Verifiable and non-verifiable are the two types of CPS rejects. All of the verifiable and non-verifiable reject codes and reasons are displayed on the following pages.

Verifiable rejects occur when a questionable, but possible, condition exists. The data in question must either be corrected or verified before an EFC can be computed. For instance, a "W" reject code will display if a very high number of family members is reported. The high number of family members is a possibility, but more than likely an entry error was made that needs to be corrected. Verifiable rejects are identified by an alpha character code.

Schools have the ability to override certain verifiable rejects using EDExpress. If the school is entering the FAFSA on behalf of the student, and the school knows that the reported information is correct, it can indicate that the verifiable reject(s) should be ignored at the CPS. Rejects B, N, and W are the rejects that can be overridden.

Non-verifiable rejects occur when critical data has not been reported, or data that is reported is inconsistent. The data in question must be provided or corrected before an EFC can be computed. Non-verifiable rejects are identified with a numeric code.

Verifiable Rejects

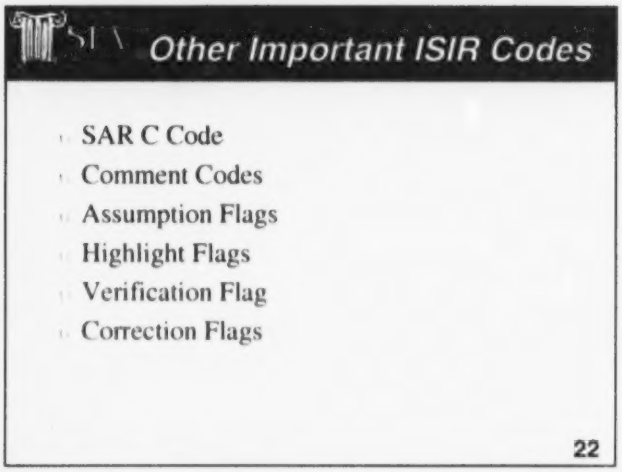
These are the only codes for rejected data that you or the student can change or verify as correct. You may revise these data or leave them unchanged.

Reject Code	Reject Reason	Resolution
A	Student's Date of birth equals 1900 through 1927	Verify or correct the following: - Date of birth
B	Independent Student Date of birth = to or greater than Sept. 1, 1986 and not equal to or greater than current year	Verify or correct the following: - Date of Birth
C	U.S. Taxes Paid equals Adjusted Gross Income	*If the applicant is dependent, verify or correct the following:* - Parent's U.S. Taxes Paid - Parent's Adjusted Gross Income *If the applicant is independent, verify or correct the following:* - Student's U.S. Taxes Paid - Student's Adjusted Gross Income
N	Either first name or last name blank	Verify or correct the following: - Student's Last Name - Student's First Name Student may have one name, but it must be verified.
P	Invalid SSN Range	Verify the following - Student's Current SSN
W	More than 15 family members reported	*If the applicant is dependent, verify or correct the following:* - Parents Number of Family Members *If the applicant is independent, verify or correct the following:* - Student's Number of Family Members

Non-Verifiable Rejects

Reject Code	Reject Reason	Resolution
1	Simplified needs test is not met and all asset data are blank.	*If the applicant is dependent, provide the following:* - Parents' Cash, Savings and Checking - Parents' Investments - Parents' Business and/or Investment Farms *If the applicant is independent, provide the following:* - Student's Cash, Savings, and Checking - Student's Investments - Student's Business and/or Investment Farms
2	Incomplete Application or Renewal Application	*If the applicant is dependent, provide the following:* - Parents' Taxed and Untaxed Income - *If the applicant is independent, provide the following:* Student's and Spouse's Taxed and Untaxed Income
5	Missing or invalid date of birth	Correct the following: - Date of Birth
8	SSN match with date of death	*If the SSN is correct*, the applicant must contact the Social Security Administration *If the SSN is incorrect*, the applicant must correct the Social Security Number – See SAR/ISIR Guide Appendix B
10	Missing marital status and number of family members	*If the applicant is dependent,* provide the following: - Parents' Marital Status - Parents' Number of Family Members *If the applicant is independent,* provide the following: - Student's Marital Status - Student's Number of Family Members
11	Marital status is inconsistent with base year income. (Not married, but two incomes reported.)	*If the applicant is dependent,* correct one or more of the following: - Parent's Marital Status - Father's 2001 Income - Mother's 2001 Income *If the applicant is independent*, correct one or more of the following: - Student's Marital Status - Student's 2001 Income - Spouse's 2001 Income
13	Missing Name	Provide the following: - Student's Last Name

Reject Code	Reject Reason	Resolution
		- Student's First Name
14	Missing student signature on FAFSA or SAR	The signature correction must be made on a printed Student Aid Report certification page and resubmitted; or the signature can be submitted electronically
15	Missing parent signature on FAFSA or SAR	The signature correction must be made on a printed Student Aid Report certification page and resubmitted; or the signature can be submitted electronically
16	Missing student signature on FAFSA on the Web, Renewal FAFSA on the Web, or FAFSA Express	Signature correction must be made on a printed Student Aid Report certification page and resubmitted to the FAFSA Processor or may be corrected electronically.
17	Unknown citizenship status or student is not a U.S. citizen or eligible non-citizen	Correct the following: - Citizenship Status
18	SSN not on Social Security Administration's database	Correct the following: - Student's SSN
19	An EFC cannot be calculated because a "hold" has been placed on the student by the Department of Education.	Comment 009, student needs to call (202) 377-3243 and ask for Debarment and Suspension Specialist.



Other Important ISIR Codes

ISIRs that have not been rejected may require resolution if they display one of the following flags: C Code; Comment Codes; Assumption Flags; Highlight Flags; Verification Flag; and Correction Flags.

SAR 'C' Code (C): This indicates a data match problem that must be resolved. A "C" will print on the ISIR report to the right of the calculated EFC. The comment codes provide additional information about the nature of the problem.

Comment Codes: These three digit codes correspond to the text that is printed on the Student Aid Report. In many cases, the comment codes provide information about processing results.

Assumption Flags (*): Assumptions occur most often when students leave fields blank. When a value is assumed, it is used in the calculation of the EFC. An "*" will display to the left of the assumed field on the ISIR report.

Highlight Flags (h): An "h" displays to the left of the highlighted field on the printed ISIR. The "h" is used to mark inconsistent, missing, or contradictory information. On the SAR, the fields in question are in boldface.

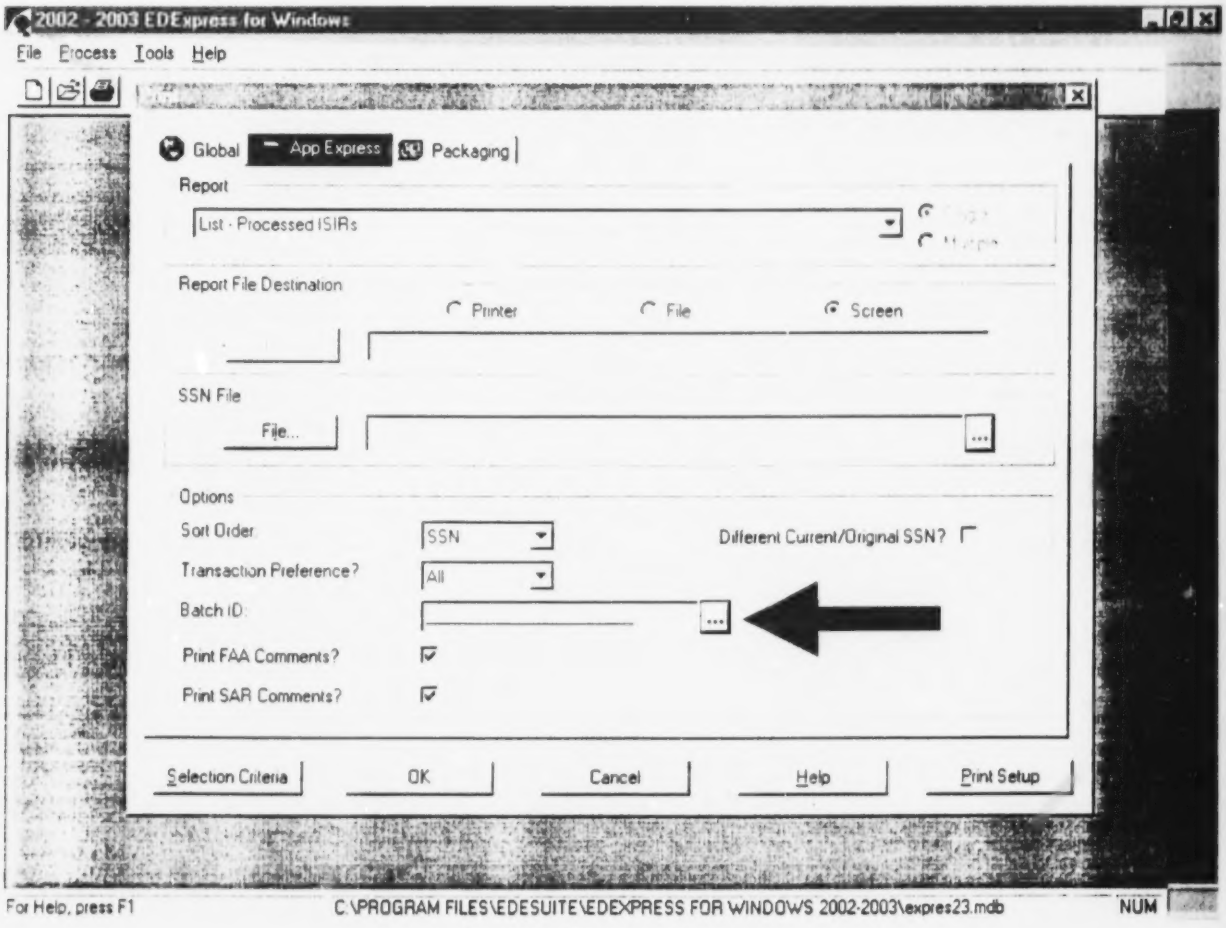
Verification Flag (*): When the transaction is selected for verification by SFA, an "*" will display to the right of the calculated EFC.

Correction Flags (# or @): An "#" to the right of the corrected field, indicates changes were made by CPS to the ISIR data or to the FAFSA on the current transaction. An "@" indicates that a correction was made on a previous transaction.

Identifying Rejected Records: Instructor Demonstration

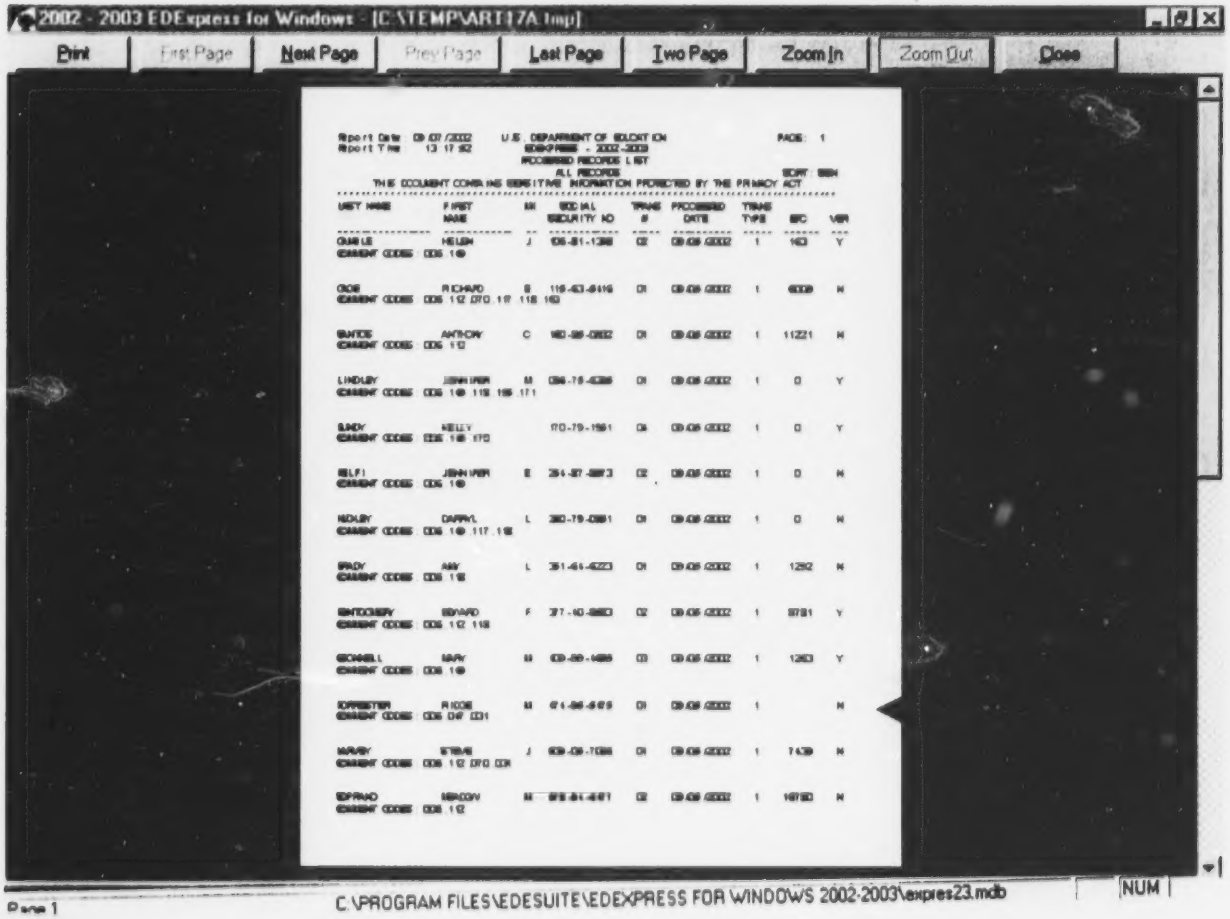
In this demonstration, we identify a rejected record in a batch of imported records, and review the information on the rejected record.

Step	Action
1	Click **File/Print** on the menu bar.
2	Make sure that the App Express tab has been selected. Click the **down arrow** in the Report text box and choose the type of list you want to print. In this case, select **List-Processed ISIRs**.
3	Click **Screen** for the output destination.
4	Click the **ellipsis button** next to Batch ID.



Identifying Rejected Records: Instructor Demonstration (continued)

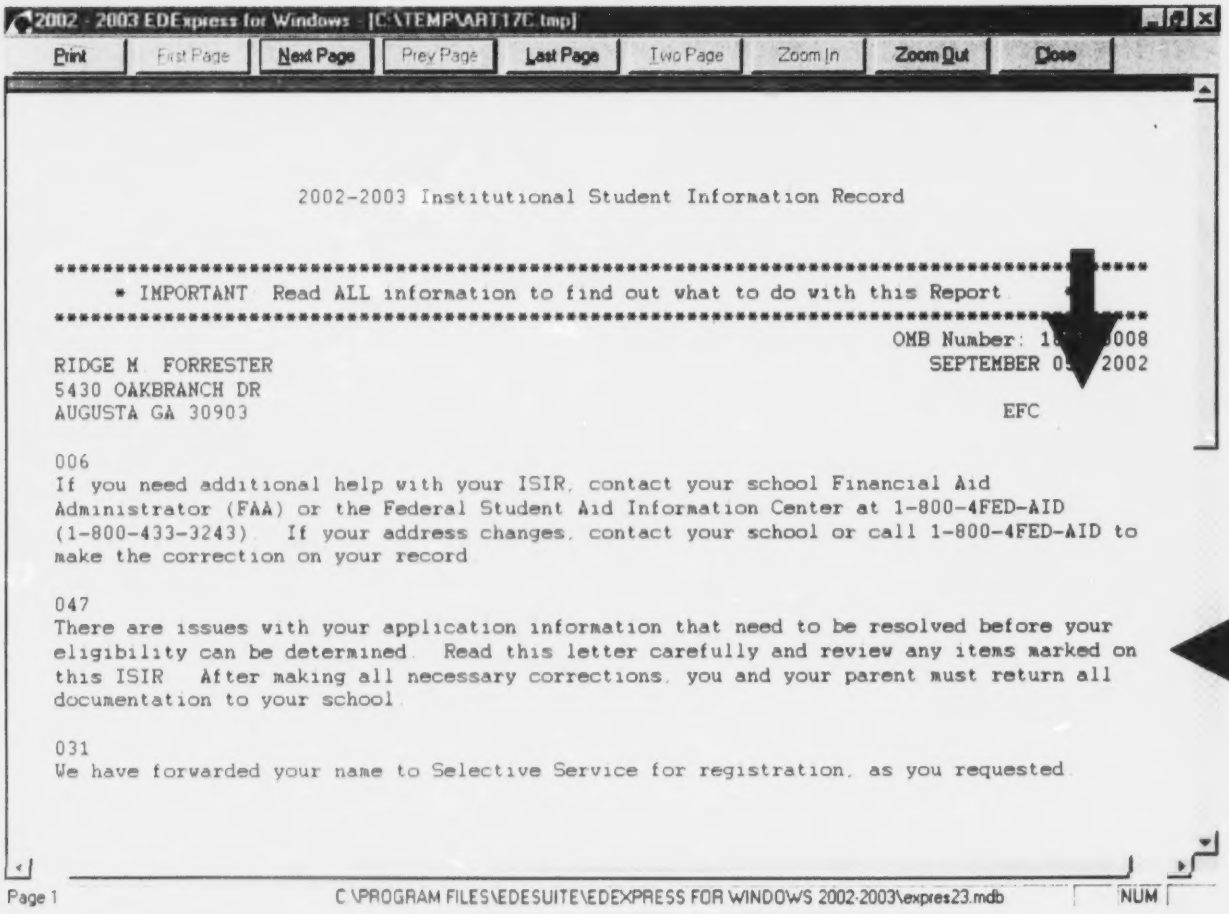
Step	Action
5	Select **#E309999920020905090038**.
6	Click **OK**.
7	Click **OK** again to run the report. The report shown below displays. Rejected records do not have an EFC. Ridge Forrester's record is the only one in the selected batch that was rejected.



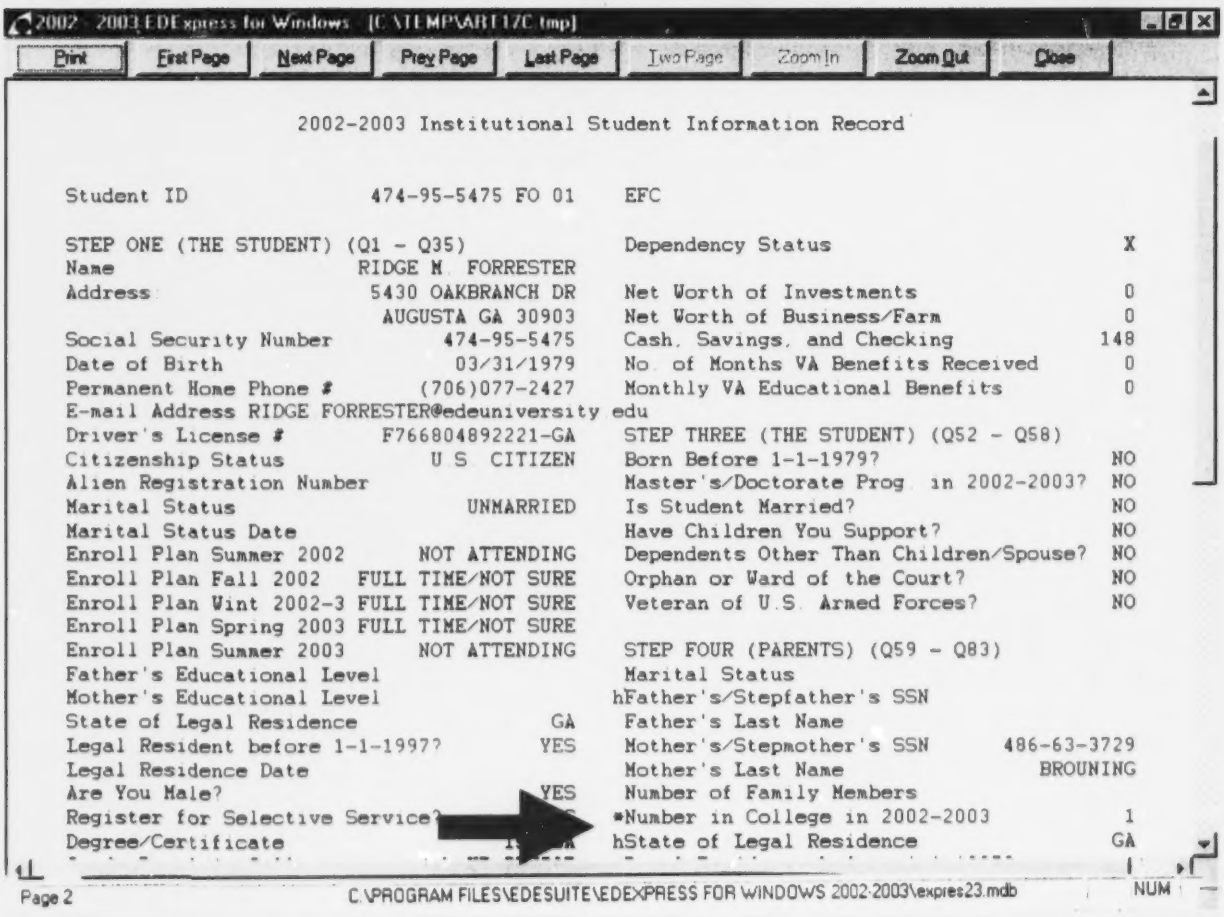
55

Identifying Rejected Records: Instructor Demonstration (continued)

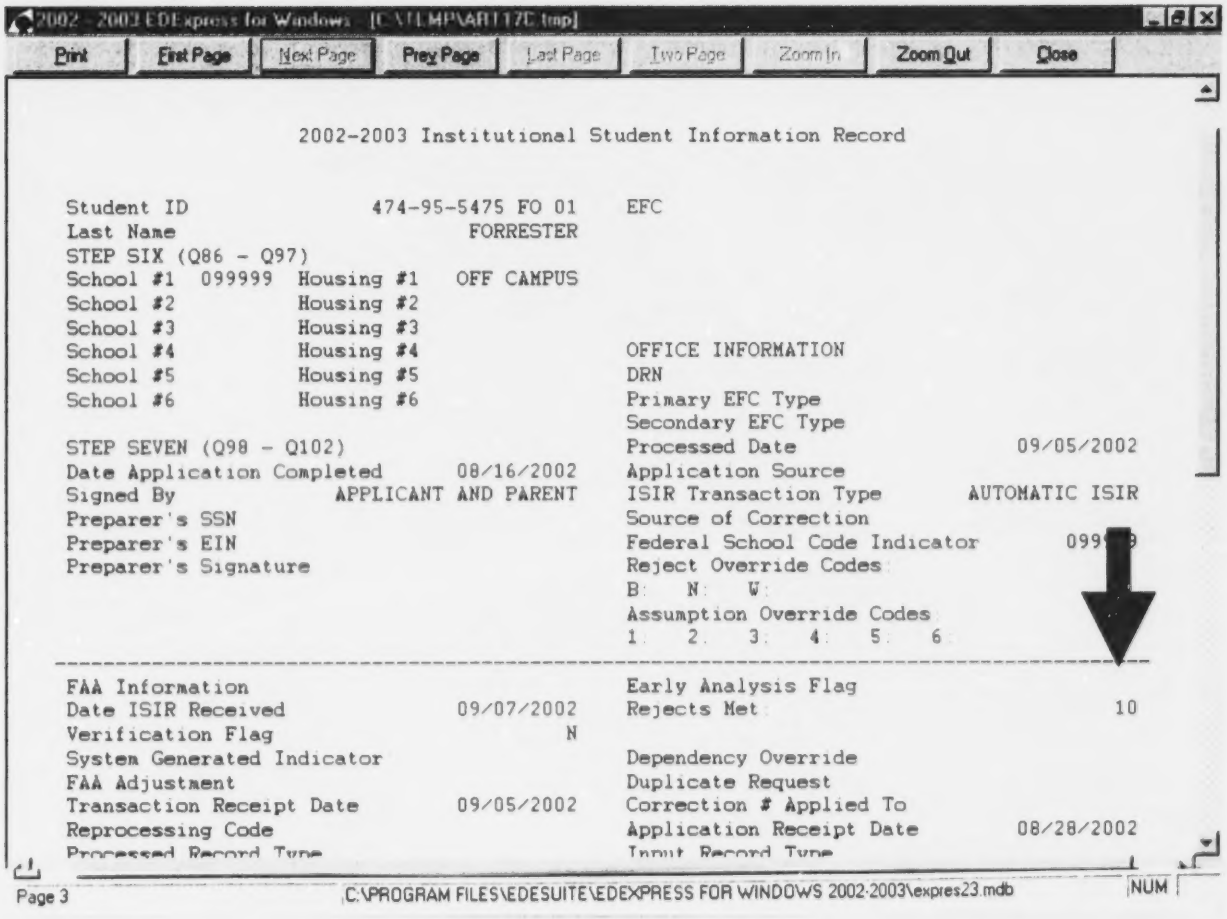
Step	Action
8	Click **Close** to exit.
9	Now learn more about the reasons why Ridge Forrester's record was rejected by printing his full ISIR record. From the menu bar, click the **Print** icon.
10	Click the **down arrow** in the report field, and select **ISIR**.
11	Click **Screen** for the output destination.
12	Click the **ellipsis button** next to the Trankey field. The records on the ISIR database display in Trankey order.
13	Click **Ridge Forrester's record** (Trankey = 474955475FO01)
14	Click **OK**.
15	Mark the **Print SAR Comments?** Box.
16	Click **OK** to run the report. The first page of the ISIR displays. (Note that the three pages of the ISIR are shown on the following pages.)
17	Click **Zoom In** to enlarge the report. Notice two things about the first page that indicate that Ridge Forrester's record is rejected: • No EFC is printed in the upper right corner of the report. • The comment indicates that information must be resolved before the student's eligibility can be determined.
18	Click **Next Page**. Notice the following on this page of the ISIR. • An assumption was made about the Parent's Number in College in 2002-2003 ("*") • The Parent State of Legal Residence is highlighted. ("h")
19	Click **Next Page.** Notice where the Reject Reason codes are listed. Ridge Forrester's record was rejected for reason 10, which means that his Parent's Marital Status and Number of Family Members are both missing. Click **Prev Page** to confirm that both of those items are missing.
20	Click **Close**.


2002 - 2003 EDExpress for Windows - [C:\TEMP\ART17C.tmp]
Print
First Page
Next Page
Prev Page
Last Page
Two Page
Zoom In
Zoom Out
Close
2002-2003 Institutional Student Information Record
* IMPORTANT Read ALL information to find out what to do with this Report *
OMB Number: 1 008
RIDGE M FORRESTER
5430 OAKBRANCH DR
AUGUSTA GA 30903
SEPTEMBER 0 2002
EFC
006
If you need additional help with your ISIR, contact your school Financial Aid Administrator (FAA) or the Federal Student Aid Information Center at 1-800-4FED-AID (1-800-433-3243). If your address changes, contact your school or call 1-800-4FED-AID to make the correction on your record.
047
There are issues with your application information that need to be resolved before your eligibility can be determined. Read this letter carefully and review any items marked on this ISIR. After making all necessary corrections, you and your parent must return all documentation to your school.
031
We have forwarded your name to Selective Service for registration, as you requested.
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2002-2003\expres23.mdb
NUM

57


2002 - 2003 EDExpress for Windows [C:\TEMP\ART17C.tmp]
Print
First Page
Next Page
Prev Page
Last Page
Two Page
Zoom In
Zoom Out
Close
2002-2003 Institutional Student Information Record
Student ID 474-95-5475 FO 01
STEP ONE (THE STUDENT) (Q1 - Q35)
Name RIDGE M FORRESTER
Address 5430 OAKBRANCH DR
AUGUSTA GA 30903
Social Security Number 474-95-5475
Date of Birth 03/31/1979
Permanent Home Phone # (706)077-2427
E-mail Address RIDGE.FORRESTER@edeuniversity.edu
Driver's License # F766804892221-GA
Citizenship Status U.S. CITIZEN
Alien Registration Number
Marital Status UNMARRIED
Marital Status Date
Enroll Plan Summer 2002 NOT ATTENDING
Enroll Plan Fall 2002 FULL TIME/NOT SURE
Enroll Plan Wint 2002-3 FULL TIME/NOT SURE
Enroll Plan Spring 2003 FULL TIME/NOT SURE
Enroll Plan Summer 2003 NOT ATTENDING
Father's Educational Level
Mother's Educational Level
State of Legal Residence GA
Legal Resident before 1-1-1997? YES
Legal Residence Date
Are You Male? YES
Register for Selective Service?
Degree/Certificate
EFC
Dependency Status X
Net Worth of Investments 0
Net Worth of Business/Farm 0
Cash, Savings, and Checking 148
No. of Months VA Benefits Received 0
Monthly VA Educational Benefits 0
STEP THREE (THE STUDENT) (Q52 - Q58)
Born Before 1-1-1979? NO
Master's/Doctorate Prog. in 2002-2003? NO
Is Student Married? NO
Have Children You Support? NO
Dependents Other Than Children/Spouse? NO
Orphan or Ward of the Court? NO
Veteran of U.S. Armed Forces? NO
STEP FOUR (PARENTS) (Q59 - Q83)
Marital Status
hFather's/Stepfather's SSN
Father's Last Name
Mother's/Stepmother's SSN 486-63-3729
Mother's Last Name BROWNING
Number of Family Members
*Number in College in 2002-2003 1
hState of Legal Residence GA
Page 2
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2002-2003\expres23.mdb
NUM

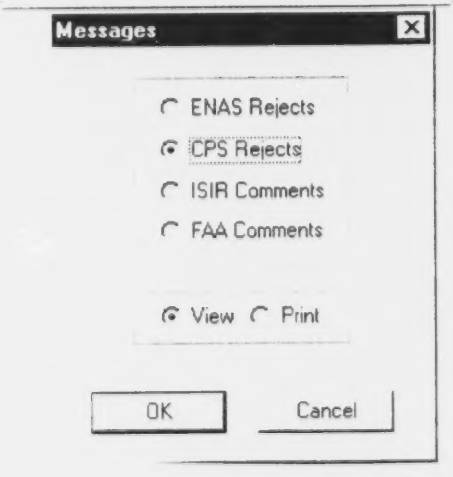
EST COPY AVAILABLE


2002 - 2003 EDExpress for Windows - [C:\TEMP\ART17C.tmp]
Print
First Page
Next Page
Prev Page
Last Page
Two Page
Zoom In
Zoom Out
Close
2002-2003 Institutional Student Information Record
Student ID 474-95-5475 FO 01
Last Name FORRESTER
STEP SIX (Q86 - Q97)
School #1 099999 Housing #1 OFF CAMPUS
School #2 Housing #2
School #3 Housing #3
School #4 Housing #4
School #5 Housing #5
School #6 Housing #6
STEP SEVEN (Q98 - Q102)
Date Application Completed 08/16/2002
Signed By APPLICANT AND PARENT
Preparer's SSN
Preparer's EIN
Preparer's Signature
EFC
OFFICE INFORMATION
DRN
Primary EFC Type
Secondary EFC Type
Processed Date 09/05/2002
Application Source
ISIR Transaction Type AUTOMATIC ISIR
Source of Correction
Federal School Code Indicator
Reject Override Codes
B: N: W:
Assumption Override Codes
1: 2: 3: 4: 5: 6:
FAA Information
Date ISIR Received 09/07/2002
Verification Flag N
System Generated Indicator
FAA Adjustment
Transaction Receipt Date 09/05/2002
Reprocessing Code
Processed Record Type
Early Analysis Flag
Rejects Met 10
Dependency Override
Duplicate Request
Correction # Applied To
Application Receipt Date 08/28/2002
Input Record Type
Page 3
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2002-2003\expres23.mdb
NUM

Viewing Messages: Instructor Demonstration

Opening the individual student record and viewing the messages is another way of learning about what needs to be resolved.

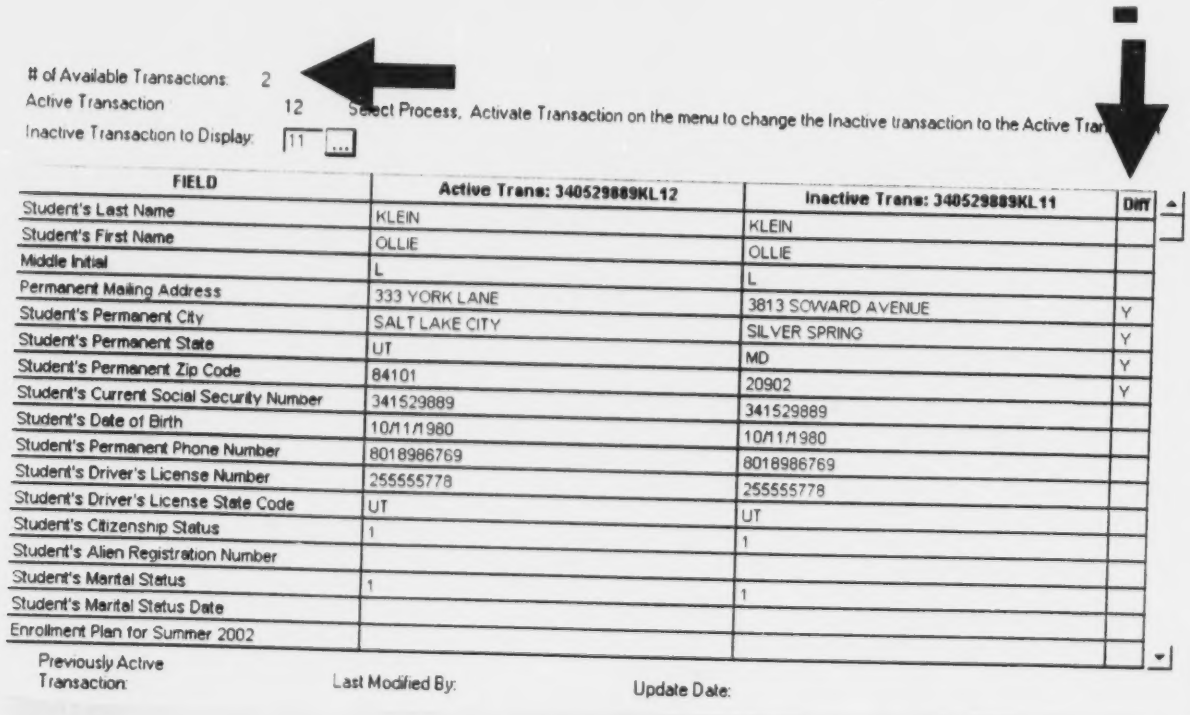
Step	Action
1	Click the **Open** icon on the menu bar.
2	Click **ISIR** to list the records on your ISIR database.
3	Click **Ridge Forrester's record** (SSN = 474-95-5475).
4	Click **OK.** Ridge Forrester's SSN displays.
5	Click **OK**. Ridge Forrester's demographic record displays.
6	Click the **SAR/ISIR** tab. The ISIR record displays.
7	Select **View/Messages** from the menu bar. A Messages dialog box displays. Four options are provided: • ENAS Rejects displays any edit failures caused by data you have entered. • CPS Rejects displays the reason(s) the record was rejected by the CPS and the data fields to review and correct. • ISIR Comments displays all comment text relevant to the record. • FAA Comments displays only those comments targeted to you in the financial aid office.
8	Mark **CPS Rejects** and click **OK**. A report displays with an explanation of the reject reason. Click **Close** to return to the ISIR record, and the **Close** icon to exit the record.



Using the ISIR Review Tab: Instructor Demonstration

The ISIR Review tab is another way to review a student's information. Use the ISIR Review tab to compare the student's active ISIR transaction with any other transaction. Remember: The active transaction is the transaction that will import into other modules of EDExpress. You can make the current transaction the Active Transaction by selecting **Process/Activate Transaction** with the SAR/ISIR tab open.

Step	Action
1	Click the **Open** icon.
2	Type **340-52-9889**, the SSN for Ollie Klein. Click **OK.**
3	The demographic record displays. Click the **ISIR Rvw tab**. The student's active ISIR transaction displays, along with the previous transaction in the second column. The number of ISIRs on the database displays at the top of the screen. In this example, two transactions exist. If other transactions exist, you would click the ellipsis button next to Inactive Transaction, then make a selection. Note that differences between the Active and the Inactive transaction are noted in the column titled Diff.
4	Click the **Close** icon.


# of Available Transactions: 2
Active Transaction: 12
Inactive Transaction to Display: 11
Select Process, Activate Transaction on the menu to change the Inactive transaction to the Active Tra
FIELD
Active Trans: 340529889KL12
Inactive Trans: 340529889KL11
Diff
Student's Last Name KLEIN KLEIN
Student's First Name OLLIE OLLIE
Middle Initial L L
Permanent Mailing Address 333 YORK LANE 3813 SOWARD AVENUE Y
Student's Permanent City SALT LAKE CITY SILVER SPRING Y
Student's Permanent State UT MD Y
Student's Permanent Zip Code 84101 20902 Y
Student's Current Social Security Number 341529889 341529889
Student's Date of Birth 10/11/1980 10/11/1980
Student's Permanent Phone Number 8018986769 8018986769
Student's Driver's License Number 255555778 255555778
Student's Driver's License State Code UT UT
Student's Citizenship Status 1 1
Student's Alien Registration Number
Student's Marital Status 1 1
Student's Marital Status Date
Enrollment Plan for Summer 2002
Previously Active Transaction:
Last Modified By:
Update Date:

61

Lesson 4 Exercise: #1

Scenario

Earlier today you imported a batch of ISIRs. Now you need to identify if any of the imported records were rejected.

Instructions

Identify who got rejected in the batch that you imported during Lesson 3. Then find out why the records were rejected by either printing ISIRs or by viewing the messages associated with each imported record.

Hint: The Batch ID of the batch that you imported in Lesson 3 is **#E30999920020901090038.**

Review

1. How many ISIR records were rejected?

   _____

2. What is the name and the Social Security number of the student(s) whose record(s) was rejected?

   _____

   _____

   _____

3. Why was the record(s) rejected?

   _____

4. What field(s) on the record(s) need to be verified or corrected before the CPS will calculate an EFC?

   _____

5. Had the rejected record(s) been corrected before? How can you tell?

   _____

Lesson 4 Exercise: #2

Instructions

Review Samantha Stephen's record (she's one of the two students) to determine what follow-up, if any, is required.

Review

1. Is the student selected for verification? If so, how can you tell?

   _____

2. Has the student's record ever been corrected in the past? If so, how can you tell?

   _____

3. What is the record's Transaction Type?

   _____

Lesson 5: Making Corrections

Lesson 5 Objectives

- Correct records using three methods:
  - SAR/ISIR tab
  - Quick corrections
  - Verification Worksheet
- Calculate an EFC
- Use Professional Judgment
- Add a school code
- Use Notes

23

Key Terms

Assumption Override

In the EDExpress software, an FAA can override certain assumptions that would be made at the CPS. When an FAA sets an override code on an electronic application, the CPS accepts the data as reported and does not make an assumption about that item. For example, if a student indicates more than six family members are attending college, the CPS would assume "one" person in college during processing. If, in fact, the original number was correct, the FAA can eliminate the need for a correction by setting the appropriate override flag in the EDExpress software.

Dependency Override

A dependency override is when, in an unusual circumstance, a student who does not meet any of the dependency criteria may still be considered to be independent based on your professional judgement. To make a dependency override, you set a flag in EDExpress on either the initial application or on a correction.

DRN

The data release number (DRN) is a four-digit number assigned to all Title IV Federal student aid applicants. Electronic corrections to student records cannot be made if your institution has not been designated on the student's transaction. However, you can add your institution code through the Quick Correction function. You will need the student's DRN and your institution code.

FAA Adjustment

EDExpress gives you the ability, on a case-by-case basis, to either increase or decrease one or more of the data elements used to calculate the EFC. The reason must be documented in the student's file. Entering a "1" in the FAA Adjustment field in EDExpress indicates that you used professional judgment.

Reject Override

In addition, EDExpress gives allows the FAA to override certain "verifiable rejects" by setting a reject override flag before transmitting the student's application. For example, a student may have an unusually large number of family members. If the FAA sets the appropriate override flag before sending the student's record, the student's record will not be rejected.

Status Code

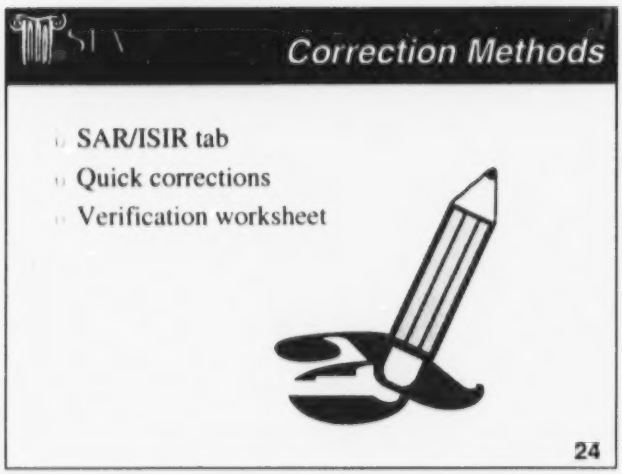
EDExpress assigns a Status Code to each entered record. Status Codes help keep track of which steps in the process have been completed. The Status Codes are:

N = Not Ready to Send

R = Ready to Send

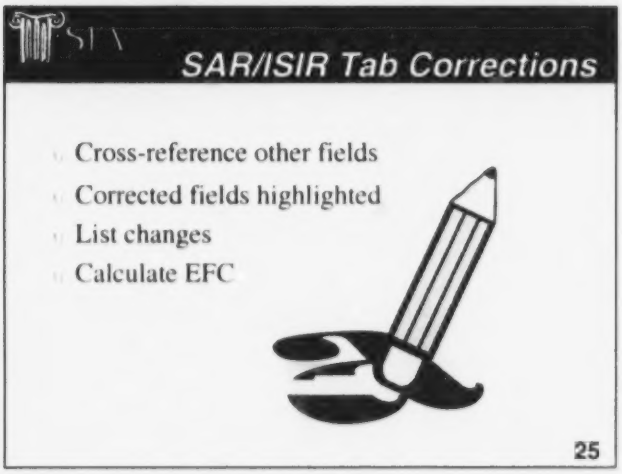
B = Batched

I = Incomplete



Correction Methods

EDExpress provides three methods for correcting application data. You can open an existing record and use the SAR/ISIR tab to make corrections, you can use the Quick Correction feature, or you can make corrections using the Verification Worksheet tab.



Correct Records using the SAR/ISIR Tab

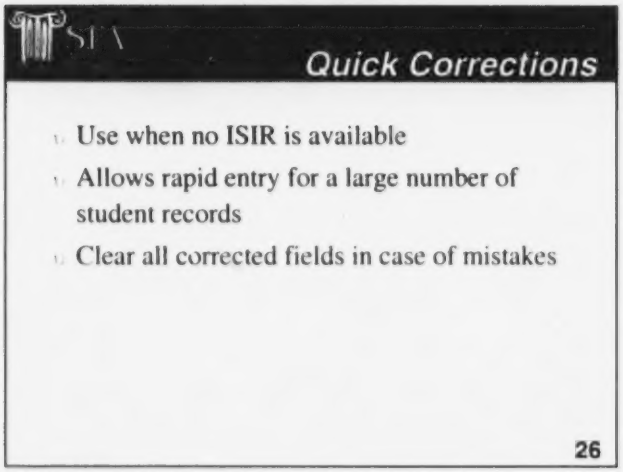
To correct records using the SAR/ISIR tab, open a student's record, click on the SAR/ISIR tab, and make corrections by replacing the existing data with the correct data. To verify that the current data is correct, place your cursor in the field and select **Process/Verify** from the menu bar.

What are the advantages of using this correction method?

- All of the student's information is displayed on three pages. You can use this information to see how your correction relates to the rest of the student's record. Also, when the record is saved the corrected values are edited to make sure that they are consistent with other values on the ISIR, reducing the possibility that the correction record will be rejected at the CPS.

  You can also easily display other ISIR transactions for the student by using the previous and next buttons on the toolbar:

- Each correction you make is highlighted in blue on the screen, making it easier to keep track of what data fields have changed.
- You can view or print a list of all corrections you have made by selecting **Process/List Changes** from the menu bar.
- Once you make and save corrections, you can calculate an estimated EFC for the student.


Quick Corrections
Use when no ISIR is available
Allows rapid entry for a large number of student records
Clear all corrected fields in case of mistakes
26

Correct Records using Quick Corrections

Use Quick Correction when any of the following conditions apply:

- You don't have an ISIR for the student on your database and you need to add your school code to the record to receive an ISIR.
- You have many records to correct at one time. You don't have to navigate from page to page to locate the field or fields to correct like you do when you use the SAR/ISIR tab method.
- You need to clear a corrected field, if you have made a mistake.

To make a quick correction, select **Process/Quick Correction** from the menu bar.

Enter the SSN, Name ID and Transaction Number (Trankey), then enter the correct value in the value column for the fields you want to correct.

Verification Worksheet Corrections

Compares ISIR values with verified data items

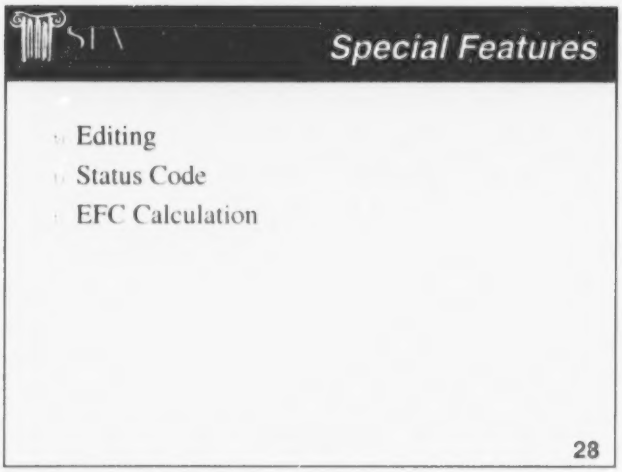
Automatically calculates the difference between the ISIR and verified values

27

Correct Records using Verification Worksheet

The Verification Worksheet feature is ideal for comparing and correcting ISIRs selected for verification by the CPS. Unlike Quick Corrections, you must have the student's ISIR on your database to use this feature.

Access the Verification Worksheet by clicking the **Ver. Wks** tab. After entering the student's Trankey, the values from the ISIR for the fields that are required for verification display in the ISIR columns on the worksheet. Enter the correct financial information from the student's tax return form or verification worksheet in the column labeled Tax/Wrksht. EDExpress will automatically compute the difference between the ISIR's information and the data entered. You have the option to have EDExpress automatically create a correction record using the entered documented values.



Editing

Once you have made corrections using either the SAR/ISIR tab or Verification Worksheet method, the software edits your data to ensure completeness and consistency. This process will identify any discrepancy between data fields, thereby preventing rejects by the CPS. If your data meets the conditions of an edit, EDExpress will prompt you to make a correction before it saves your record. Note that this editing does not occur if you use the Quick Correction method.

Status Code

The Status Code is how EDExpress keeps track of correction records. Four codes are used:

N = Not Ready to Send

R = Ready to Send

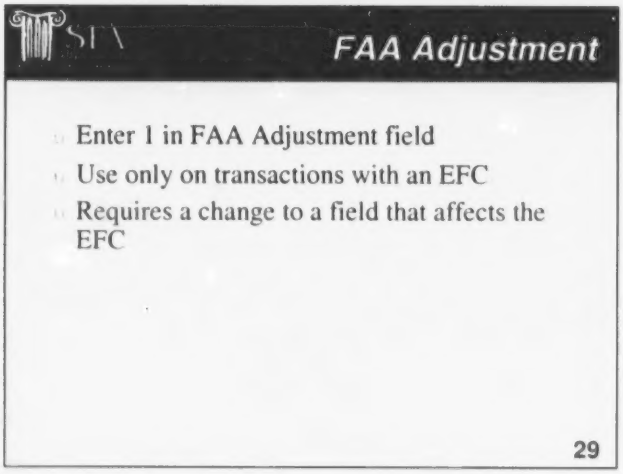
B = Batched

I = Incomplete

An entered correction first gets a status of "N", Not Ready to Send. When you save your correction, and it passes all edits, EDExpress changes the status to "R", Ready to Send. As you'll see in Lesson 6, records must have a status of "R" to be exported to the CPS. Once records are exported, the status changes to "B," Batched. Note: An "I" status, Incomplete, is applied to application records selected to be saved without performing edits.

EFC Calculation

You can calculate an estimated EFC based on the correction data you have entered before the data is sent to CPS. This EFC is for information only; it may not be used for payment of Title IV funds. With the record open, select **Process/EFC Calculation**. Note that an EFC calculation is not an option if you use the Quick Correction method.


FAA Adjustment
Enter 1 in FAA Adjustment field
Use only on transactions with an EFC
Requires a change to a field that affects the EFC
29

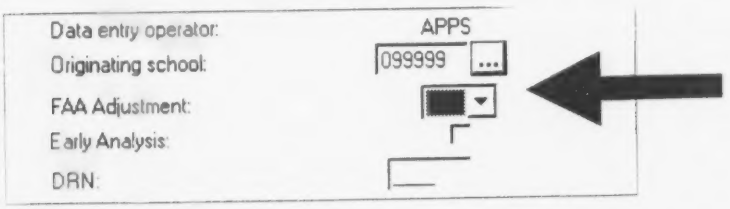
FAA Adjustment

You may use professional judgment on a case-by-case basis to either increase or decrease one or more of the data elements used to calculate the EFC. The reason must be documented in the student's file, and it must relate to that student's special circumstances that differentiate the individual student (not to conditions that exist for a whole class of students).

To make an EFC adjustment, enter 1 in the FAA Adjustment field on page 3 of the SAR/ISIR tab.

The following three rules apply to EFC adjustments:

- It must be applied to an ISIR transaction that has an EFC;
- You must make at least one correction to a field that is used in the calculation of the EFC on the same transaction;
- You cannot make an EFC adjustment on an initial application.



Dependency Override

- Modify student's dependency status from dependent to independent
- Dependency overrides can be reversed by canceling the dependency override
- Can only modify status from dependent to independent

30

Dependency Override

In unusual circumstances, a student who does not meet any of the dependency criteria may still be considered to be independent on the basis of the financial aid administrator's professional judgment. You, as the aid administrator, must make this decision on an individual (case-by-case) basis and must document the reason(s) for the decision. To allow the dependent student's application to be processed without the parents' information, you need to perform a dependency override.

To perform a dependency override in EDExpress, go to page 2 of the SAR/ISIR tab and enter 1 as the value in the dependency override field.

You may also use EDExpress to cancel a dependency override that another school performed. To cancel an override, change the value in the dependency override field to 2.

A few things to note about dependency overrides:

- You can only override the status from dependent to independent.
- Dependency overrides can be performed on an initial electronic application or on an electronic correction. However, you can only cancel dependency overrides on a correction.
- You can submit a dependency override and an EFC adjustment on the same correction record.

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Assumption and Reject Overrides

- Override codes instruct the CPS not to make assumptions or reject certain data
- 6 assumption and 3 reject overrides
- Codes can be set on either an initial application or a correction
- Set on page 3 of the SAR/ISIR Tab or on the Quick Corrections screen

31

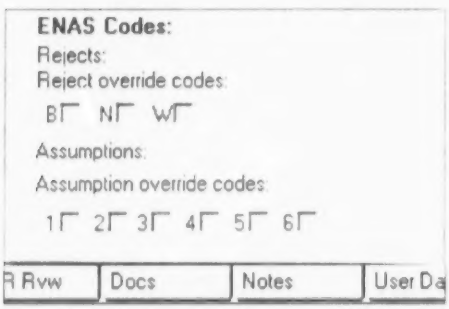
Assumption and Reject Overrides

EDExpress gives you the ability to override certain assumption and reject edits in the CPS if, in your judgement, the student's data is accurate.

Assumption edits occur when the student applicant supplies incomplete or implausible data and the CPS has enough information to make an assumption about what the student should have reported. The assumed value is used in calculating the student's EFC. The table on the following page lists the six assumption edits that can be overridden.

Three reject conditions can also be overridden. These rejects are described in the table on the following page.

Assumption and reject overrides are located on the lower right hand side of page 3 of the SAR/ISIR tab. The software edits will detect any data that can potentially create an assumption or reject at the CPS at the time you save the record. A warning dialog box will display a warning message asking you to set the corresponding assumption or reject override before saving the record. If the override is not selected, the software will not mark the record with an R status (ready for transmission). You have to correct data or set the flag before the record will be marked with an R status. If you save the record without setting any of the overrides, EDExpress will add the particular assumption or reject code to page three under the ENAS Codes section.



Assumption Overrides

Override	Condition
1	If the parents' reported number in college is greater than 6, the CPS assumes the number in college is 1 when calculating the EFC.
2	If the parents' reported Adjusted Gross Income (AGI) is blank or zero, the parents' tax return type is non blank, or is blank and the parents' tax return status is completed or estimated; and either the father or the mother reported earned income of greater than zero, the CPS assumes an AGI equal to the sum of the earned income portions when calculating the EFC.
3	If the independent student's reported number of family members equals the reported number attending college and both are greater than 2, the CPS assumes the student's number in college equals 1 when calculating the EFC.
4	If the student's reported Adjusted Gross Income (AGI) is blank or zero; the student's tax return type is non blank, or it is blank and the student's tax return status is completed or estimated; and the student reported having earned income, the CPS assumes the student's AGI equals the sum of the student's and spouse's earned income when calculating the EFC.
5	If the parent's total amount from Worksheet C is too high for the other income amounts reported, the CPS assumes zero for the amount from Worksheet C.
6	If the student's total amount from Worksheet C is too high for the other income amounts reported, the CPS assumes zero for the amount from Worksheet C.

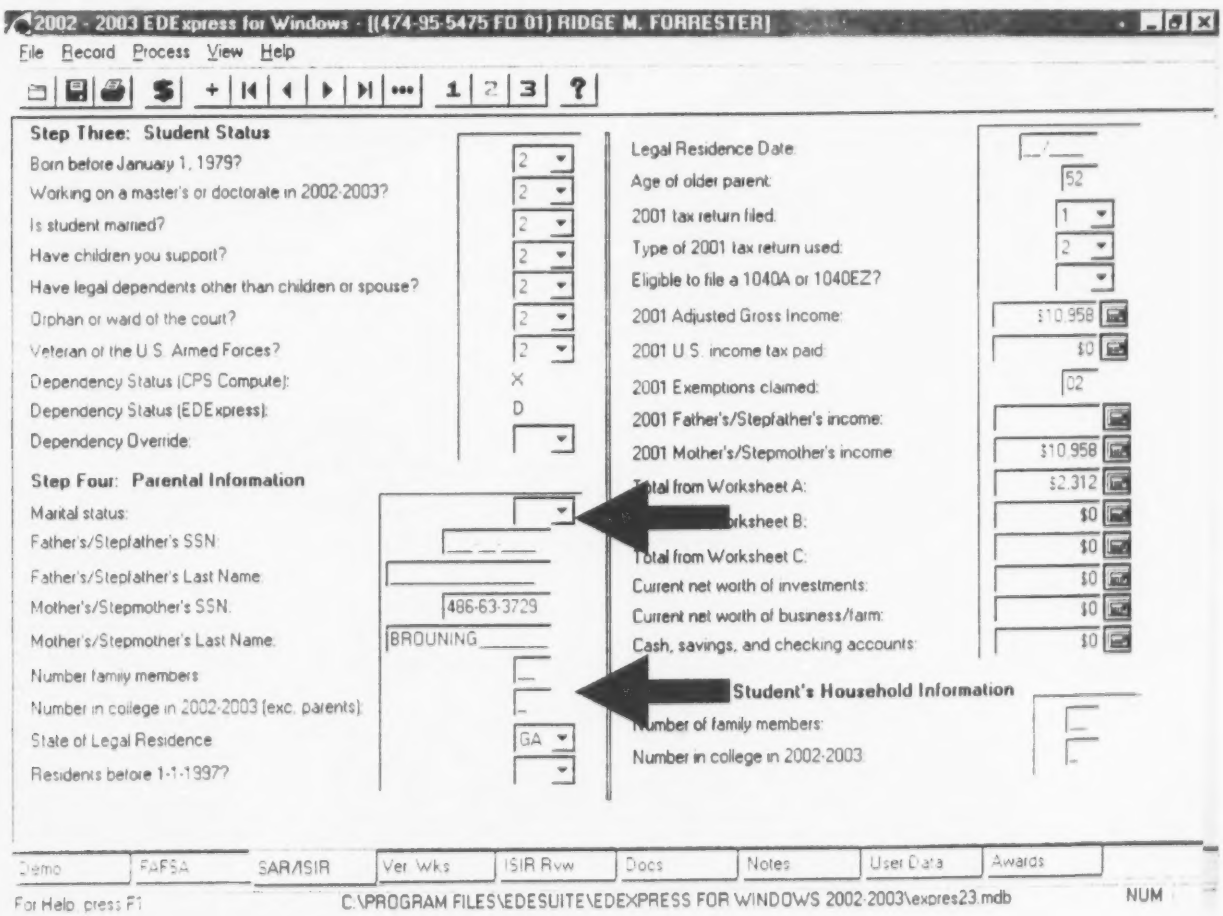
Reject Overrides

Override	Condition
B	If the student is independent and reports that he or she was born on or after September 1, 1986, the CPS rejects the applicant record for reason B.
N	If the student reports only one name, the CPS rejects the applicant record for reason N.
W	If the independent student (or parent, if dependent) reports more than 15 family members, the CPS rejects the applicant record for reason W.

Correct Records using the SAR/ISIR Tab: Instructor Demonstration

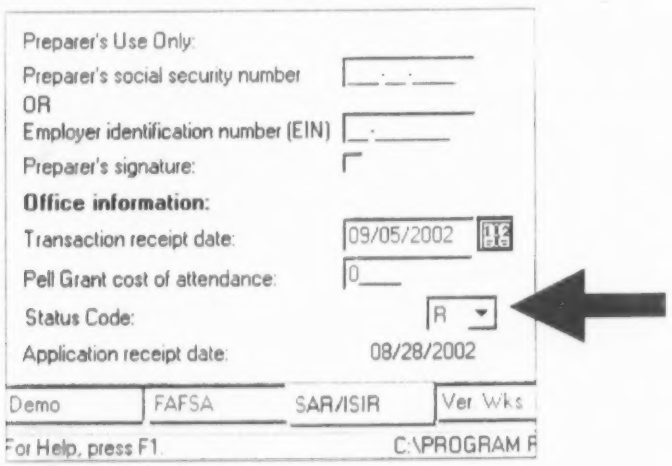
In this demonstration, we correct Ridge Forrester's record using the SAR/ISIR tab. Remember from Lesson 4 that his ISIR is rejected for reason 10. Three fields need updating: Parent's Marital Status, Number of Family Members, and Number in College.

Step	Action
1	Click the **Open icon** on the menu bar.
2	Enter Ridge Forrester's SSN: **474-95-5475**
3	Click **OK**. The Demo tab displays.
4	Click the **SAR/ISIR tab**. The first page of the record displays.
5	Click **2** on the toolbar to move to the second page.



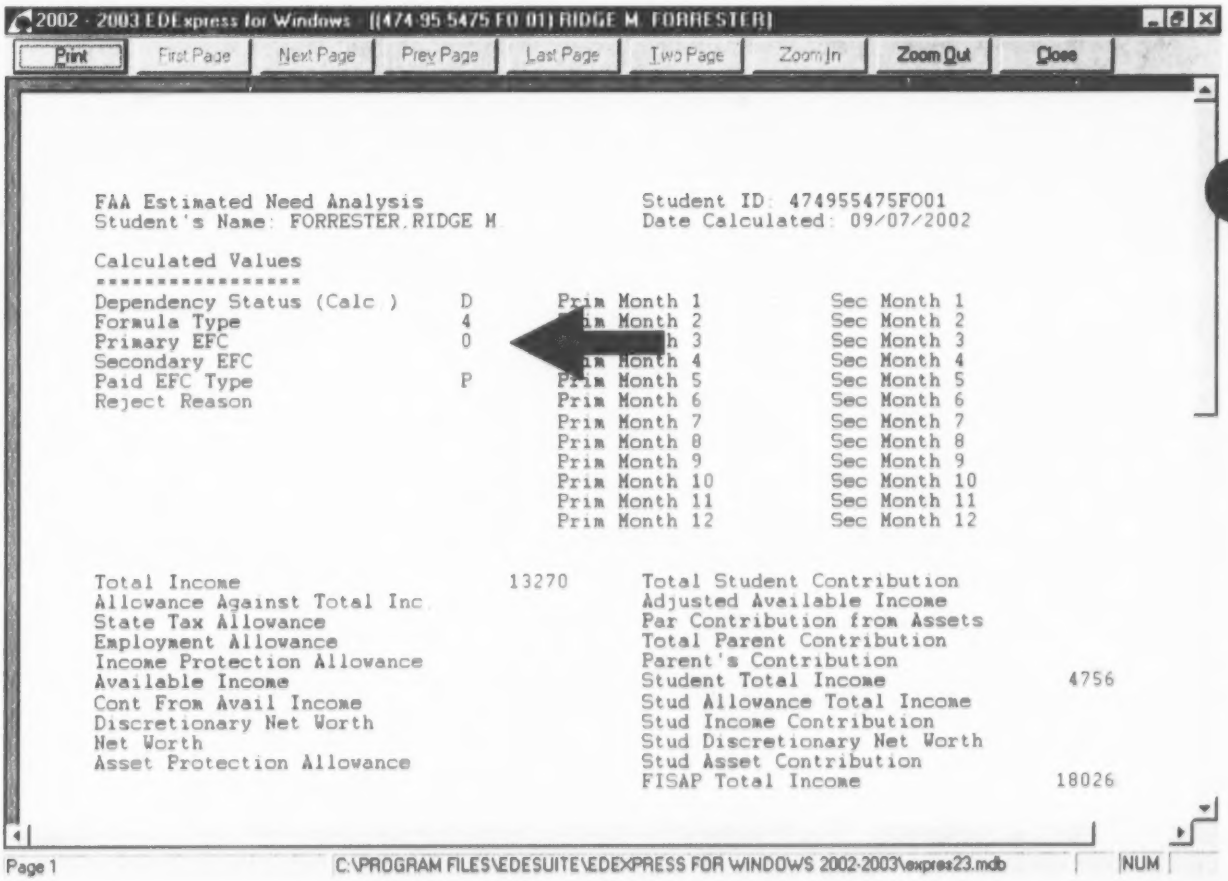
Correct Records using the SAR/ISIR Tab: Instructor Demonstration (continued)

Step	Action
6	Enter **3**, for Divorced/Separated, as the Marital Status. (Under Step 4: Parental Information)
7	Enter **3** as the Number of Family Members. (Under Step 4: Parental Information)
8	Enter **1** as the Number in College in 2002-2003. (Under Step 4: Parental Information) Note that each correction is highlighted on the screen.
9	Click [3] on the toolbar to move to the third page. Note that the Status Code equals N, meaning that it is not ready to be exported.
10	Select **File/Save** from the menu bar.
11	Click **Yes** to mark the record as ready for transmission. The record has been saved. Note that the status code now equals R, meaning that it is ready to be exported.



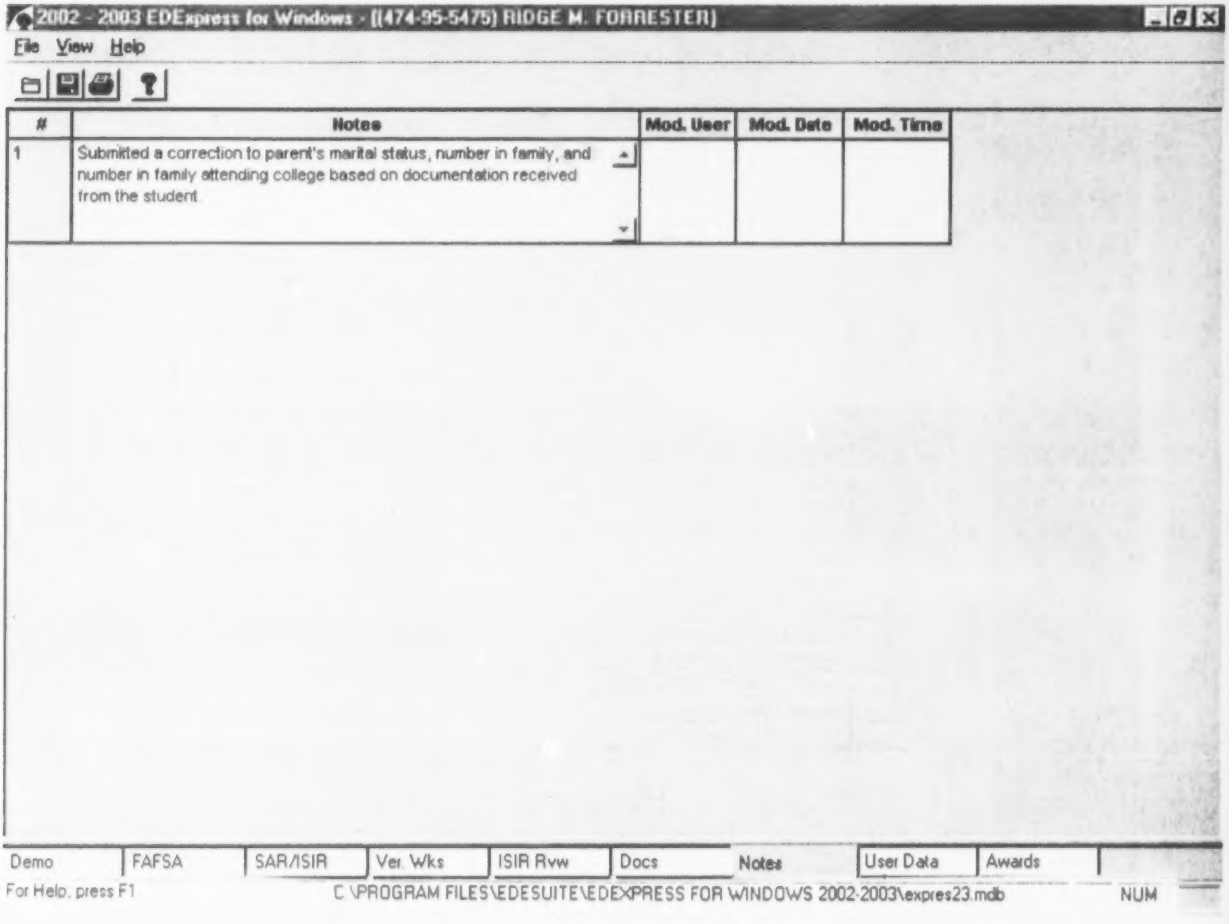
Correct Records using the SAR/ISIR Tab: Instructor Demonstration (continued)

Step	Action
12	Click **Process/EFC Calculation** from the menu bar. A dialog box displays.
13	Click **OK**.
14	The results of the student's unofficial EFC calculation displays. Click the **Zoom In** button to magnify the report. Note the Primary EFC is in the top left corner of the report.
15	Click the **Close** button to close the report.



Correct Records using the SAR/ISIR Tab: Instructor Demonstration (continued)

Step	Action
17	Click the **Notes** tab. A notepad displays. Use this feature to store information about the student's record.
18	Start typing your note. The software automatically tracks the user ID of the person who added the note, as well as the date and time it was added. Continue to add notes as needed by pressing the Enter key.
19	Click **File/Save** on the menu bar.
20	Click the **Close icon** to close the record.


2002 - 2003 EDExpress for Windows - [(474-95-5475) RIDGE M. FORRESTER]
File View Help
Notes Mod. User Mod. Date Mod. Time
1 Submitted a correction to parent's marital status, number in family, and number in family attending college based on documentation received from the student.
Demo FAFSA SAR/ISIR Ver. Wks ISIR Rvw Docs Notes User Data Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2002-2003\expres23.mdb
NUM

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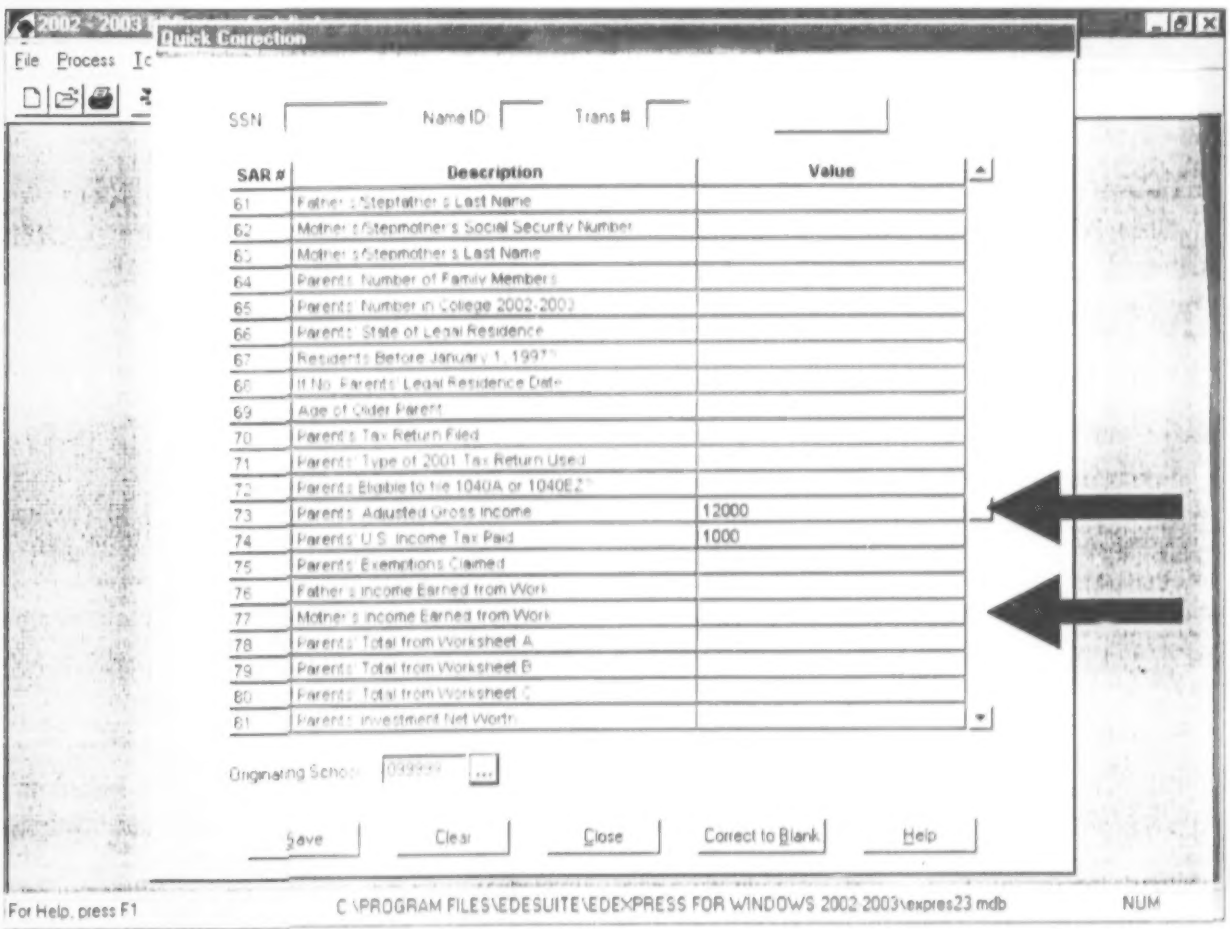
Correct Records using Quick Corrections: Instructor Demonstration

In this demonstration we use the Quick Correction method to make corrections to three data fields and to add your school code to a record so that you will receive the student's ISIR.

Step	Action
1	Select **Process/Quick Correction** from the menu bar.
2	Enter the student's Trankey. In this case enter: **111-11-1111 NE 01**
3	Click **Continue**.
4	Scroll down to SAR #73, Parent's Adjusted Gross Income. Enter **12000**.
5	Enter **1000** for Parent's U.S. Income Tax Paid.
6	Point at Mother's Income Earned From Work and click **Correct to Blank**.


2002-2003
Quick Correction
File Process
SSN
Name ID
Trans #
SAR #
Description
Value
61 Father's/Stepfather's Last Name
62 Mother's/Stepmother's Social Security Number
63 Mother's/Stepmother's Last Name
64 Parents' Number of Family Members
65 Parents' Number in College 2002-2003
66 Parents' State of Legal Residence
67 Residents Before January 1, 1997
68 If No, Parents' Legal Residence Date
69 Age of Older Parent
70 Parent's Tax Return Filed
71 Parents' Type of 2001 Tax Return Used
72 Parents Eligible to File 1040A or 1040EZ
73 Parents' Adjusted Gross Income 12000
74 Parents' U.S. Income Tax Paid 1000
75 Parents' Exemptions Claimed
76 Father's Income Earned from Work
77 Mother's Income Earned from Work
78 Parents' Total from Worksheet A
79 Parents' Total from Worksheet B
80 Parents' Total from Worksheet C
81 Parents' Investment Net Worth
Originating School
Save
Clear
Close
Correct to Blank
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2002 2003\expres23.mdb
NUM

Correct Records using Quick Corrections: Instructor Demonstration (continued)

Step	Action
7	Scroll down to SAR #86, Federal School Code 1. Enter **099999** as your school code. Note: • You can add your school code to any of the six Federal School Code fields. (If you are working from a paper SAR, we recommend adding your school code to a blank field.) • You can add another school's code. • The code you enter does not have to match the originating school code that is displayed at the bottom of the screen.
8	Scroll down to SAR #112, DRN. Enter **0999.** The data release number is a four-digit number assigned to all Title IV Federal student aid applicants that appears only on the paper SAR. It is unique to the student applicant. You must provide the student's DRN when adding your school code.
9	Click **Save**. The Quick Corrections screen redisplays, letting you create additional correction records.
10	Click **Close**.

Correct Records using Verification Worksheet: Instructor Demonstration

In this demonstration we use the Verification Worksheet method to create a correction record for a student who was selected for verification.

Step	Action
1	Press the **Ctrl** and **O** keys at the same time. The Open dialog box displays.
2	Enter the student's SSN. In this case enter: **106-81-1398**
3	Click **OK**. The demographic tab displays.
4	Click the **Ver. Wks** tab.
5	Click the **ellipsis button** on the toolbar to retrieve the appropriate transaction. A list of all ISIR transactions displays. In this case, only one exists on the database.
6	Click **OK.** The verification worksheet displays with relevant data from the ISIR.
7	The parents submitted a tax return. Enter **18000** for Parent's AGI and **1000** for Parent's U.S. Income Tax Paid in Tax/Wrksht columns. Note that the difference between the ISIR and Tax/Wrksht values is calculated.
8	Click the **Correct button**. A correction record will be created containing all of the documented values in the Tax/Wrksht column. Note that if no differences exist between the ISIR and Tax/Wrksht columns (or if differences are within the established tolerances) it won't be necessary to create a correction record. If such was the case, you would click the Save icon to save the record.
9	Click **Yes** to confirm.
10	Click **OK**. Note that the corrected values are highlighted on the Verification Worksheet.
11	Click **File/Close** from the menu bar.

Lesson 5 Exercise #1

Scenario

Earlier today you imported a batch of ISIRs and discovered a rejected record that required follow-up. (Carol Hathaway, SS# 378-34-9028)

Instructions

a. For the rejected record:

- Enter the necessary correction(s) using the SAR/ISIR tab method (change the family members from 20 to 2).
- Calculate an unofficial EFC for the student after you enter and save the correction(s).
- Enter a Note for the student record that documents your action.

b. For one other record on your database of your choosing, correct the Student's Income Earned from Work to $5,000 using the Quick Corrections method.

Review

1. What are the benefits of using the SAR/ISIR tab to make a correction?

2. What are the benefits of using the Quick Correction method?

3. Could you have made an EFC adjustment on the rejected ISIR?

Lesson 5 Exercise #2

True or False

1._____ The DRN is a four digit number that must accompany a school code correction.

2._____ You have a greater chance of having the record rejected at the CPS if you use the Quick Correction method instead of the SAR/ISIR tab method of correcting data.

3._____ The CPS would reject a record with only these two fields corrected:

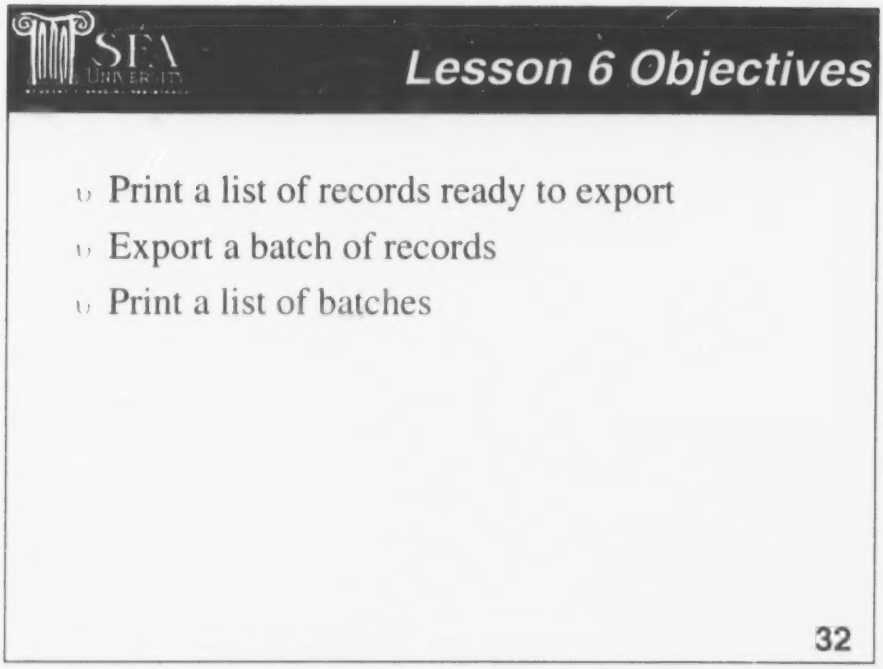
- FAA Adjustment flag
- Student's Last Name

4._____ You can override the student's dependency status from independent to dependent by entering a 1 in the dependency override field.

5._____ You can now use the Quick Corrections method if you want to enter an assumption override.

6._____ Once you've made and saved a correction record, you can access that record prior to batching it for transmission.

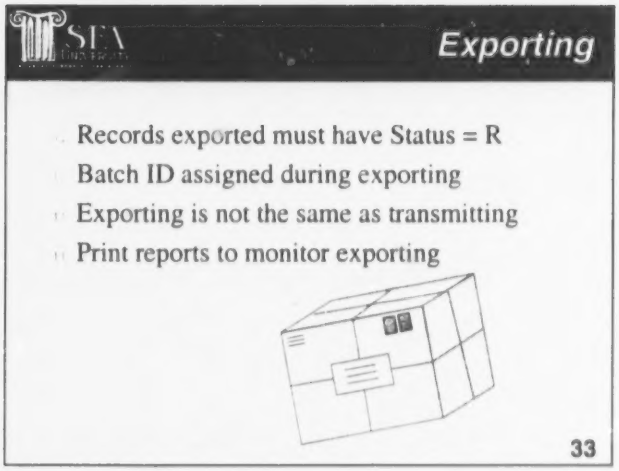
Lesson 6: Exporting Data



Key Terms

TG

The five-character TG number is your user ID with the SAIG. It is assigned by the SAIG to your school upon receipt of your participation agreement.



Exporting

Exporting takes the records on your database that have an "R" (ready) status and creates a file that can be transmitted to the CPS. The status code on each exported record is changed to "B", for batched. Each exported file receives a message class (refer to Lesson 3) that identifies the type of records. Also, exporting assigns a batch ID to the file. Browse the batch activity database after exporting records to see what you have done.

Use the reporting capabilities of EDExpress to keep track of what records you have exported. You are able to print lists of corrected records, as well as of exported batches.

Note: exporting is not the same as transmitting. After you've exported the records, you need to use EDconnect to transmit the file to the SAIG.

Print List of Corrected Records: Instructor Demonstration

You should print a list of records ready to export before you send them to CPS. In this demonstration we show you how.

Step	Action
1	Click **File/Print** on the menu bar.
2	Make sure the App Express tab is highlighted. Click the **down arrow** in the Report text box and choose the type of list you want to print. In this case, select **List - Entered Correction Records**.
3	Click **Screen** for the output destination.
4	Click the **down arrow** in the Sort Order text box, and select **Last Name.**
5	Leave the batch ID field blank. (Since we haven't exported correction records yet, no batch ID has been created. This can be a useful print option after you've exported records.)
6	Click the **down arrow** in the Transaction Status text box, and select **R - Ready to Batch.**
7	Leave the Entry Date Range blank. (This can be a useful field to identify correction records that were entered on certain dates.)
8	Note that you can further specify the records to print by using a Query (Selection Criteria). In this case, we won't use a Query. Click **OK.** The report displays in Last Name order showing the correction records ready to be exported with the fields that were corrected.
9	Click **Close.**

SOCIAL SECURITY NO	NAME CODE	TRAN #	STAT CODE	LAST NAME	ADD DATE	SAR FIELDS CORRECTED	CORRECTED VALUE
474-95-5475	FO	01	R	FORRESTER	09/07/2002	059	3
						064	03
						065	1

87

Exporting Corrections: Instructor Demonstration

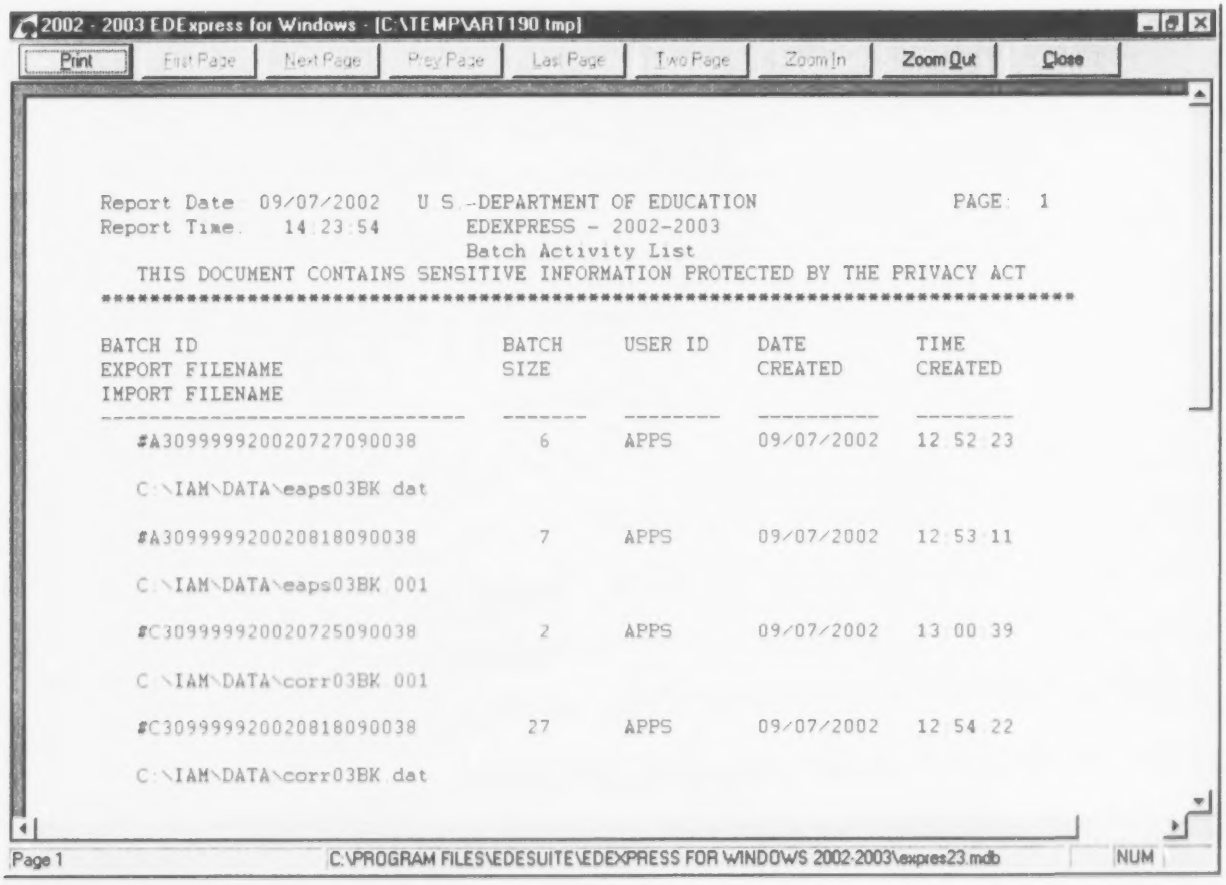
The next step, as we show in this demonstration, is to export the correction records.

Step	Action
1	Select the export icon from the tool bar.
2	Make sure that the App Express tab is highlighted. Click the **down arrow** and select **Corrections** as the Export Type.
3	The Export To: field specifies the filename that will be created (CORR03IN.DAT) and the folder where the file will be placed. These are default settings that you establish when you set up the software in **Tools/Setup/Global/File Management.** We recommend that you not change them. Note that your school code displays what you entered when you setup the software in **Tools/Setup/Global/School**. This school code will be placed on each correction record. Also, your TG # displays. This number is required. It is the number you established when you set up the software in **Tools/Setup/Global/System**. Note that you can export selected records by using a Query (Selection Criteria). In this case, we won't. Click **OK** to export the records. A batch export statistics box displays that shows the number of records exported. Note that the number of records exported will not always equal the number of ISIR records that you created. Each correction record that is sent to the CPS carries up to 12 corrections. If you make more than 12 corrections to an ISIR, an additional record(s) will be created to carry the additional corrections.
4	Click **OK**.
5	Click **OK** again.

Print List of Batch Activity: Instructor Demonstration

Two ways are provided in EDExpress for reviewing batch activity: you can browse the batch activity database as we did in Lesson 3 and you can print a list of batch activity. In this demonstration we show you how to print a list of batch activity.

Step	Action
1	Click the **printer icon** on the tool bar.
2	Make sure that the App Express tab is highlighted. Click the **down arrow** in the Report text box and choose the type of list you want to print. In this case, select **List - Batch Activity**.
3	Click **Screen** as the Report File Destination.
4	Click **OK**. The report displays showing all import and export activity.
5	Click the **Close button**.



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Lesson 6 Exercise

Scenario

Your final assignment for the day is to export all of the correction records you entered today.

Instructions

- Print a list of correction records.
- Export the correction records.
- Print a list of batches that have been exported and imported.

Review

1. How many records were in the batch that you exported?

_____

2. What was the message class? What does the "IN" in the message class indicate?

_____

3. What was the batch status of the records before they were exported? After?

_____

4. What was the date and time that you exported the batch?

_____

5. Can you tell from the batch activity report who on your staff exported and imported each batch?

_____

6. Will the number of student records you correct always equal the number of records exported? Why or why not?

_____

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